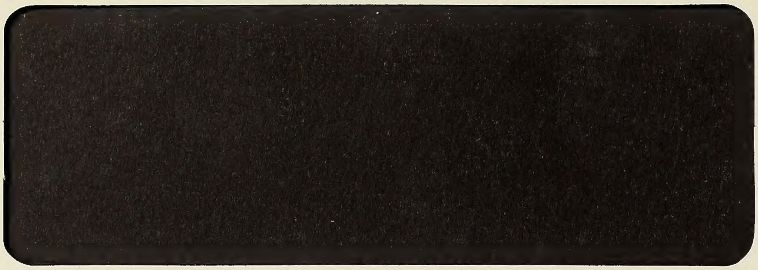
EFFECTIVE DEMAND FOR GARDEN SUITES IN ALBERTA

Alberta
MUNICIPAL AFFAIRS
Housing Division



**EFFECTIVE DEMAND FOR
GARDEN SUITES IN ALBERTA**

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Alberta Municipal Affairs

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Executive Summary

1. Background

Alberta Municipal Affairs is exploring the prospect of allowing garden suites as a senior citizen housing option for Alberta. As part of that effort, the Department has implemented, in cooperation with the City of Lethbridge and the County of Parkland, a garden suite pilot project. The project involved the construction, placement and occupancy of two garden suite units in Lethbridge and three in Parkland.

A number of public and private sector groups have expressed an interest in the garden suite option. However, their willingness to invest and play a significant role in this option is largely dependent upon credible estimates of effective demand. This study provides such estimates.

2. Objectives

The principal objective of this study is to provide current estimates of effective demand for garden suites as temporary accommodation for elderly parents and grandparents of homeowners in whose yard the garden suite will be placed. Effective demand refers to take-up which will occur if reasonable opportunities are provided. The study also provides estimates of potential demand according to various relevant subsets.

3. Overview of Approach

The approach used in undertaking this study involved three basic steps. First, a mail-out survey of primary stakeholders (seniors and host families) was undertaken to determine the level of interest in garden suites. The expressions of interest resulting from this survey were used as the basis for estimating *potential interest*. Where an expression of interest arising from a particular senior or host family was matched with that of a corresponding host family or senior, this interest was assumed to represent *potential demand*. By definition, demand for a garden suite unit can only take place if the interest of a senior can be matched with that of a host family, or vice versa. Second, a survey of secondary stakeholders (planning and municipal approving authorities and seniors' and related organizations) was undertaken to examine and analyze the many factors which could affect the take-up of garden suites. Third, the implications of these findings on the estimates of

potential interest and demand were considered to arrive at reasonable estimates of *effective demand.*

4. Key Findings

Primary Stakeholder Group - Potential interest in garden suites for seniors aged 65 and over for Alberta for 1991 is estimated at about 37,000 and double that (80,000) for seniors aged 55 and over. Potential demand (matched responses) for the same age groupings is estimated to be about 3,300 and 7,000 respectively. It is important to note, however, that the potential demand estimates are not statistically valid due to the small number of matched responses which were received. The estimates, therefore, are provided only as interesting indicators of demand in the absence of any other statistically valid information. Potential interest for 1996 reflects the projected population growth and is estimated to be about 42,000 and 89,000 for the 65 and over and 55 and over age groupings. Potential interest arising from host families is estimated at about 141,000 for 1991 and 149,000 for 1996.

The survey of primary stakeholders resulted in three subsets of estimated potential interest: by different regions of the province (north, central and south); by urban, rural, and semi-rural areas; and, at different rent levels ($225, $425, and $700). Potential levels of interest are estimated to be lowest for the north region, primarily because of a lower population, and about the same for the remaining two regions. Also, as a result of higher population levels, potential interest appears highest in urban areas. The survey responses indicate that the highest potential interest for garden suites is at the market rent level of $425. The economic rent level of $700 resulted in the lowest interest estimate.

Secondary Stakeholder Group - The results of the survey of this group suggest that there is little, if any, known demand for garden suites. Few indicators of demand are evident. This lack of evident indicators is common to all regions of the province and to all types of communities. The only two exceptions are Lethbridge and Parkland where some demand, albeit not extensive, appears to exist.

Other Information Sources - A small, but consistent, number of calls of interest have been reported by Alberta Municipal Affairs and the Manufactured Housing Association suggesting, once again, that some limited demand exists for garden suites. Some recent internal work undertaken by CMHC suggests a demand

between 6,000 and 7,000 units for Alberta.

5. Effective Demand

Effective demand for garden suites in Alberta for 1991 is estimated by this study to be in the order of some 3,000 units for the 55 years and over age group as long as rent levels do not exceed market rent substantially. If the eligible age for garden suites is 65 years and over, effective demand could be reduced to one half of this figure. The relevant indicators which have been considered in estimating effective demand are as follows:

- Lot size and impact on amenity space play an extremely significant role in the feasibility of placing a garden suite unit and, therefore, on effective demand. Some 40% of the total host family respondents and some 30% of the positive respondents indicated that their lot size is too small to accomodate a garden suite. Even more importantly, reduced amenity space was the most frequently noted misgiving of those interested in garden suites.

- Effective demand can be expected to be extremely price sensitive. The potential demand estimate of 7,000 units is valid only at, or below, market rent levels. If economic rent levels are applied, take-up demand could be substantially reduced.

- Neighbourhood and community acceptance of the manufactured garden suite unit was cited frequently as a possible deterrent to the garden suite concept in a significant number of communities. This deterrent will affect demand at the local level, at least for the short term.

- Experience and other studies have proven that there is a very significant difference between potential interest and potential demand, and effective take-up demand. With each additional level of commitment required, effective demand is reduced substantially.

In spite of the foregoing factors which negatively impact demand, other factors suggest that effective demand likely will increase over time and that by 1996, effective demand could be as high as 7,000 units for the 55 and over age group at rents up to market rent. As was noted above, if the eligible age is limited to 65 years and over, effective demand could be reduced to one half of this figure. Other factors

which could result in increased effective demand over time are summarized below.

- Increased awareness of the garden suite concept can be expected to play a significant role in generating demand for garden suites in the future. This is supported by the increase in interest generated by the pilot project in Lethbridge and Parkland and by the increased number of calls of interest at key intervals throughout the pilot project process. The conclusions of the CMHC market study strongly stress the importance of awareness of the garden suite concept in terms of market potential. In particular, the positive impressions of the concept as a result of having visited a demonstration project and seen the product was noted and corroborated by statistics provided by the Manufactured Housing Association.

- A strong marketing campaign, combined with a comprehensive awareness program, can have a major impact on take-up demand.

- Although many study participants felt demand for garden suites was limited at this time and that many problems need to be resolved, without exception, the garden suite concept was considered a good housing option for some seniors. Such support will inevitably generate local interest and, in time, increased demand for garden suites.

1.0 Introduction

1.1 Background

Alberta Municipal Affairs is exploring the prospect of allowing garden suites as a senior citizen housing option for Alberta. As part of that effort, the Department has implemented, in cooperation with the City of Lethbridge and the County of Parkland, a garden suite pilot project. The project involved the construction, placement and occupancy of two garden suites in Lethbridge and three in Parkland.

The experience gained in the pilot project to date suggests that while garden suites are a good seniors' housing option, the demand for garden suites would be small if this housing option was made available. Yet other garden suites studies which have been undertaken at the national level suggest a significant demand. This apparently contradictory information indicates that effective demand for garden suites in Alberta may be difficult to estimate.

A number of public and private sector groups have expressed an interest in the garden suite option. However, their willingness to invest and play a significant role in this option is largely dependent upon credible estimates of effective market demand. The purpose of this study is to provide such estimates.

1.2 Objectives and Scope

The principal objective of this study is to provide current estimates of effective demand for garden suites as temporary accommodation for elderly parents and grandparents of homeowners in whose yard the garden suite will be placed. Effective demand refers to take-up which will occur if reasonable opportunities are provided.

In addition to the principal objective, the study provides estimates of demand according to the following subsets:

1. demand projected over the next five years to 1996;
2. demand in different regions of the province;
3. demand in urban, rural and semi-rural areas; and
4. demand at different rent levels.

Three different geographic regions of the province have been identified for study purposes: north, central and southern regions. The boundaries of the regions follow generally recognized and accepted municipal and regional planning commission boundaries and are shown on Figure 1.

Also, three alternate rent levels were identified for estimating purposes: $225, $425 and $700 per month. These rent levels reflect the minimum per unit rate for subsidized self-contained senior citizen apartment projects, average 1990 market rates for one bedroom apartment units as determined by Alberta Municipal Affairs through the Alberta Apartment Vacancy and Rental Cost Survey, and the estimated economic rent for garden suites respectively. The economic rent is partly based upon the pilot project experience.

Where possible, estimates of demand are provided both in terms of potential senior occupants of garden suites and homeowners or host families in whose yard suites would be placed. Estimates for senior occupants are considered for three age categories including 65 and over, 60 and over, and 55 and over. The implications of alternate eligible relationships on demand also are considered.

1.3 Overview of Approach

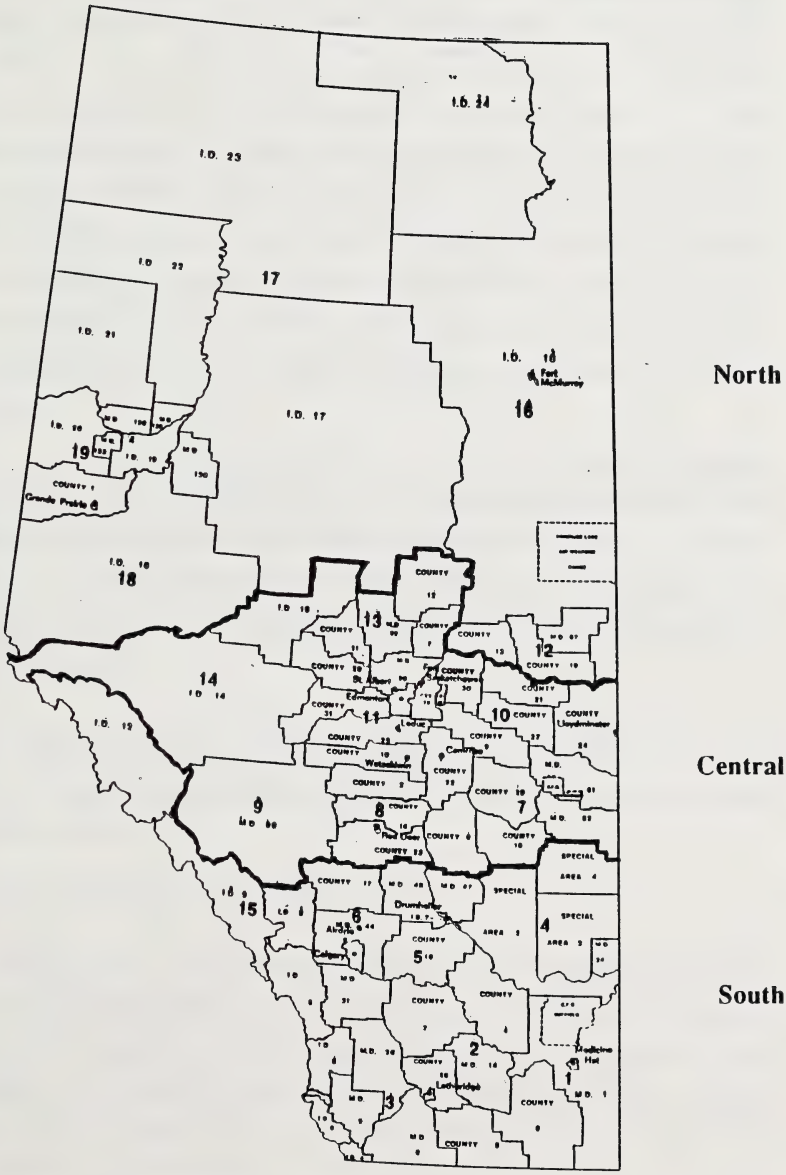
The basic approach used for undertaking this study involved the survey of two key stakeholder groups: primary and secondary groups. The primary stakeholder group is comprised of potential users and includes seniors who fall within the three age variables defined for study purposes, and homeowners who could serve as prospective hosts for garden suites. The secondary stakeholder group is comprised of municipal and other organizations which may provide valuable insight related to the demand for garden suites. This group includes planning and municipal subdivision approving authorities, and selected seniors' and related organizations. The survey techniques used varied for each group and are described in Section 2.0 of this report. The results from the surveys provided the base data for estimating demand for garden suites. Other relevant sources of information also were investigated and served as input for analyzing the base data.

1.4 Report Organization

This report contains five major sections. Section 2.0 describes the study approach used for obtaining base data and for estimating demand. Sections 3.0, 4.0 and 5.0 identify key findings of the study as determined by the surveys of the primary stakeholder group, the secondary stakeholder group and other information sources respectively, and resultant demand related conclusions are provided in Section 6.0. Comprehensive technical appendices also are provided.

Figure 1

Regions of the Province



2.0 Approach

2.1 General Description

The approach used in undertaking this study involved three basic steps. First, a mail-out survey of the primary stakeholder group (seniors and host families) was undertaken to determine the level of interest in garden suites. The survey method used is descibed below in Section 2.2. The expressions of interest resulting from this survey were used as the basis for estimating *potential interest* for garden suites for Alberta as a whole and by the various subsets identified in Section 1.2. These estimates were determined by applying the percentage factor of survey respondents who expressed an interest in garden suites, to total provincial and applicable subset population figures. Percentage factors and population figures were broken down by the three age groupings as defined by the study objectives. Where an expression of interest arising from a particular senior or host family was matched with that of a corresponding host family or senior, this interest was assumed to represent *potential demand.* By definition, demand for a garden suite unit can only take place if the interest of a senior can be matched with that of a corresponding host family, or vice versa.

Next , a survey of the secondary stakeholder group was undertaken to examine, measure and analyze the implications of the many factors which could affect take-up demand of garden suites if reasonable opportunities are provided. The survey method used for this group varied according to the type of organization and is described in Section 2.3. This step also included an analytical inventory and investigation of other relevant information sources. The sources investigated are listed in Section 2.4.

Finally, the impact of the survey findings of the secondary stakeholder group on the estimates resulting from the expressions of interest as determined by the survey of the primary stakeholder group were considered to arrive at a reasonable estimate of *effective demand.*

2.2 Survey of Primary Stakeholder Group

The approach taken in surveying the primary stakeholder group involved the mail-out of survey instruments to seniors and host families in ten case study municipalities. The case study municipalities, which are identified in Table 1, were selected to ensure province-wide representation and to allow for estimates of demand by the subsets as prescribed by the study objectives. The two subsets which were used as the basis for selecting the case study municipalities

are demand in different regions of the province (north, central and south) and demand in urban, rural and semi-rural areas. The selection process is described in Appendix I.

Table 1

Case Study Municipalities

Region	Urban	Rural	Semi-Rural
North	Peace River	M.D. of Bonnyville	n/a
Central	Edmonton	County of Red Deer	County of Parkland
South	Hanna Calgary Lethbridge	County of Newell	County of Foothills

The survey instrument included an explanatory letter, an information package on garden suites, a multiple choice questionnaire and a stamped return envelope. The questionnaires differed for seniors and host families and were designed to respond to the study objectives. Both questionnaires were tested and modified prior to survey implementation. An information sheet was attached to the questionnaire asking for the name and address of a corresponding senior or host family to take part in the survey. This resulted in matched responses which, as was noted previously, are regarded by this study as key indicators of effective demand for garden suites. A complete survey instrument package which includes both the senior and host family questionnaires is provided in Appendix II.

A total of 1,750 surveys were sent in an initial mail-out, including 1,300 to seniors and 450 to host families. Senior survey participants were identified using three sources: seniors' and related organizations; the Senior Citizens' Rental Assistance Program (SCRAP); and the Senior Citizens' Home Heating Program. Some 40 seniors' and related organizations in the ten case study municipalities were approached to obtain lists of prospective survey participants. These organizations are listed in Appendix III and include senior citizen associations, senior drop-in

centers, health units providing home care service and senior citizen housing authorities. While some seniors' organizations provided names of prospective participants, the majority were more comfortable receiving bundles of 20 or 25 survey instruments and distributing these themselves. A breakdown of seniors' surveys by source and by case study municipality is provided in Table 2.

Table 2

Breakdown of Number of Seniors Surveys Mailed Out by Source and Case Study Municipalities

Communities	Home Heating	SCRAP	Seniors Org.	Total
Edmonton	50	50	150	250
Calgary	50	50		100
Lethbridge	50	50	75	175
County Parkland	25	25	75	125
Hanna	25	25	75	125
County of Newell	25	25	50	100
County of Red Deer	25	25	75	125
Peace River	25	25	50	100
MD Foothills	25	25	50	100
MD Bonnyville	25	25	50	100
Total Surveys	325	325	650	1300

In a follow-up attempt to more precisely estimate the size of the Edmonton and Calgary markets, an additional 200 (80 senior and 20 host to each city) surveys were distributed to these cities. The response rate for this additional survey, however, was too low to affect the initial survey results.

It is recognized that the approach used in identifying senior survey participants was not totally random and that the sample is not statistically representative. However, it was decided that a somewhat selective approach, whereby survey

participants were chosen from various seniors' organizations and related programs, would potentially result in a higher response rate.

It is also recognized that for the semi-rural and rural municipalities, the seniors' organizations approached for a survey sample were located in the urban communities encompassed by these semi-rural and rural municipalities. However, these seniors' organizations serve the surrounding rural as well as urban areas and every attempt was made to obtain the rural membership list for sampling purposes. The consultants had little option in this regard since virtually all such organizations were located within local urban agricultural service centers.

Host family participants were randomly selected from the telephone directory in most case study municipalities. For rural areas, Rural Route (RR) addresses were preferred, although post office box addresses in very small centers also were chosen since the likelihood of a respondent living on a farm or acreage was increased. A random sample of suitable host family participants obtained from assessment rolls was provided by the two pilot project municipalities of Lethbridge and Parkland. The 450 host family surveys mailed out were equally distributed amongst the ten case study municipalities.

A second mail-out was undertaken of matched responses. Once again, matched responses are those where participants from the first mail-out indicated an interest in a garden suite and provided the name of their corresponding senior or host family. A total of 32 matched responses were mailed out.

To encourage a greater response rate, all seniors' organizations were telephoned four weeks after the initial mail-out to ensure that the surveys had been distributed. It appeared at that time that as much effort as possible had been expended to distribute the survey packages. Follow-up calls also were made to all matched participants to ensure that they had received the package and to encourage them to return the questionnaire.

Survey responses from the primary stakeholder group have been compiled and analyzed using a computerized statistical package. The resultant findings are documented in Section 3.0.

2.3 Survey of Secondary Stakeholder Group

As was noted previously, the secondary stakeholder group consists of planning and municipal approving authorities and appropriate seniors' and related organizations in the case study municipalities. This group was surveyed in order to obtain input on anticipated demand for, and attitudes and perceptions related to, garden suites. Factors investigated relate to the various subsets of demand and include:

- urban versus rural demand;
- demand in relation to community size;
- demand in relation to size of senior population;
- demand in relation to subsidized housing options;
- qualitative opinions;
- cultural variations and values; and,
- public perceptions and acceptance.

The planning and municipal approving authorities were surveyed by requesting a response to a demand-related issue paper which was mailed out to appropriate authorities along with an invitation to attend one of two garden suite discussion forums. A list of the authorities contacted and the issue paper are contained in Appendix IV. This paper, as well as six other garden suite related issue papers, was discussed at the forums which were held in the two pilot project municipalities of Lethbridge and Parkland. A written response to the paper was also requested to augment, or in lieu of, participation at the forums.

The second subgroup corresponds to the seniors' and related organizations which were approached to obtain names of prospective senior survey participants and are listed in Appendix III. The survey instrument developed and mailed out to this group is included in Appendix V and consists of eight pertinent demand related questions presented in letter form. Representatives of the organizations surveyed were asked to respond to the questions on the basis of local familiarity and the views of their senior members and/or clientele. Representatives were contacted by telephone to obtain direct response to the questions. The input obtained from the two subgroups comprising the secondary stakeholder group is summarized in Section 4.0.

2.4 Other Information Sources

Other sources of information were investigated to obtain relevant input for estimating demand for garden suites. Most of the information is qualitative in nature and, therefore, serves as interesting indicators of demand. The relevant information investigated includes the following:

1. Information on senior citizen subsidized self-contained housing projects was obtained from Alberta Municipal Affairs for the case study municipalities to determine if there is any correlation between local demand for garden suites, as identified by the secondary stakeholder group, and the availability of subsidized self-contained housing units.

2. Information on the number and source of calls of interest with respect to garden suites was obtained from Alberta Municipal Affairs and the Manufactured Housing Association of Alberta and Saskatchewan.

3. The national garden suite market survey undertaken in 1988 by Gallup Canada Inc. on behalf of Central Mortgage and Housing Corporation (CMHC) was reviewed to identify findings which may be useful for estimating effective demand for garden suites in Alberta.

The relevant input obtained from the foregoing sources of information is summarized in Section 5.0.

3.0 Findings for Primary Stakeholder Group

3.1 Overview of Survey Findings

Overall, a response rate of 18% was achieved for the survey, or 318 returned responses of the 1,750 which were mailed out. A total of 264 out of 1,300 senior questionnaires (20%) and 54 out of 450 host family questionnaires (12%) were returned. Table 3 summarizes the response rates for seniors and host families for each case study municipality. Of the 32 matched responses which were sent, five were returned for a response rate of 16%.

Table 3

Response Rate for Seniors and Host Families by Case Study Municipality

Seniors			
Communities	Sent Out	Received	Response Rate
Lethbridge	175	5	3%
County of Parkland	125	9	7%
Hanna	125	14	11%
County of Newell	110	15	14%
County of Red Deer	130	14	11%
Peace River	100	19	19%
MD Foothills	125	24	19%
MD Bonnyville	110	29	26%
Edmonton/Calgary	300	134	45%
n/a		1	
Total	1300	264	20%

Host Families			
Communities	Sent out	Received	Response Rate
Lethbridge	45	1	2%
County of Parkland	45	5	11%
Hanna	45	4	9%
County of Newell	45	3	7%
County of Red Deer	45	3	7%
Peace River	45	5	11%
MD Foothills	45	1	2%
MD Bonnyville	45	6	13%
Edmonton/Calgary	90	25	28%
n/a		1	
Total	450	54	12%

The senior and host family questionnaire responses from Edmonton and Calgary have been aggregated, as no clear breakdown was received from the survey.

In aggregate, survey results indicated that 51 of the 264 senior respondents or 19% were interested in garden suites. Of the 264 senior respondents, 230 were aged 65 and over and an additional 17 were aged 60 to 64 for a total of 247 aged 60 and over. A further 4 were aged 55 to 59 for a total of 251 aged 55 and over. The remaining respondents were under 55 years old or did not give their age. The positive response rates for these age groups are summarized in Table 4. Total responses for each survey question are tabulated in Appendix VI.

Table 4

Summary of Senior Responses
Expressions of Interest by Age Group

Age Group	Expressions of Interest			%
	Yes	No	Total	Interested*
65 plus	40	190	230	17
60-64	7	10	17	
55-59	3	1	4	
Subtotal	50	201	251	20
under 60	0	3	3	
age not given	1	9	10	
Subtotal	1	12	13	
total	51	213	264	19

* Percentages are not shown for totals of less than 30 since the totals are not statistically valid and percentages, therefore, are unreliable.

For host families, 16 of the 54 respondents or 30% were interested in garden suites. Appendix VII contains responses totalled for each question comprising the host family survey. For matched responses, 3 of the 5 returned, or 60% were interested. However, as is discussed below, the number of returns for matched responses is too small to be statistically valid.

In any statistical analysis, caution must be exercised to ensure that there is sufficient confidence with the results of the data. As a rule of thumb, a sample size of 30 is considered adequate to approximate the normal distribution of the population. As a result, while the sample size for the entire survey, as well as for the senior and host family surveys, are sufficient at the aggregate level, in many cases further breakdowns of these samples are less than 30 and, therefore, are not statistically valid.

The results have been tested to a 95% confidence level. That is, if another survey is undertaken with the same sample size, the sample mean will fall within the same range 95 times out of 100. The greater the range, the less confidence there is that the sample results reflect what the true population results would be. A reasonable degree of confidence can be placed on the sample results which have a confidence interval of +/- 5%.

3.2 Estimates of Potential Interest for Alberta

Potential interest, for the purposes of this study, refers to an interest in garden suites which arises when a senior or host family expressed such an interest in this housing option and does not take into account factors such as cost or lot size. The estimates of potential interest are based exclusively upon such expressions of interest. The survey results and the resultant percentage factors have been scaled to appropriate provincial population totals. Potential levels of interest have been estimated both for seniors and for host families for 1991 and projected to 1996.

3.2.1 Seniors

Estimates of potential interest for seniors are based upon population projections developed by the Alberta Bureau of Statistics (Series 5 - Medium Growth Rate). For 1991, population figures have been estimated by scaling 1990 actuals to the 1991 projected figures.

The estimates of potential interest for 1991 and 1996 are shown in Table 5 and compared in Figure 2. Base population figures used and positive response rates as derived from expressions of interest also are shown. Potential interest has been estimated for the age categories as defined by the study objectives including 65 and over, 60 and over and 55 and over.

Table 5

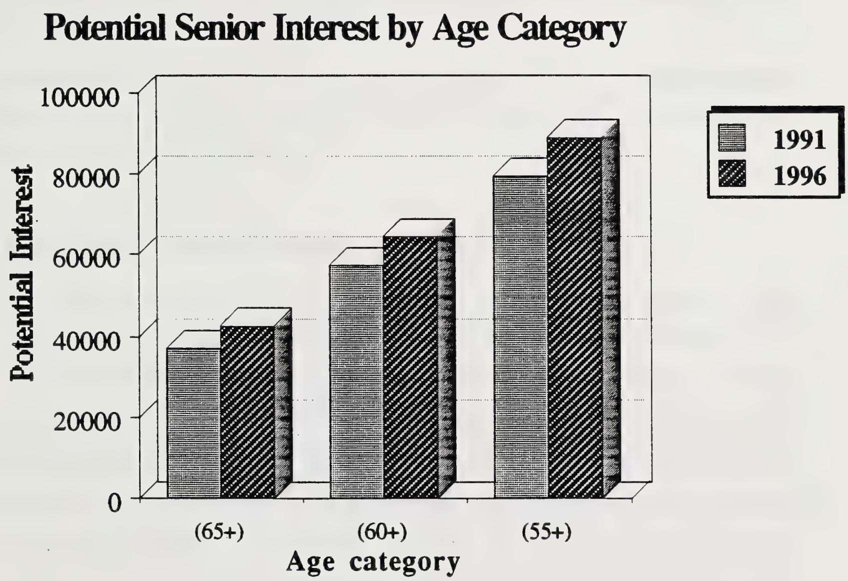
Estimates of Potential Interest
for
Alberta by Age Group
(1991 and 1996)

Age Group	Positive Responses	Total Responses	Positive % Factors *	Base Population 1991	Base Population 1996	Potential Interest 1991	Potential Interest 1996
65 and Over	40	230	17	216,582	249,848	36,819	42,474
60 and Over	47	247	19	302,953	340,547	57,561	64,704
55 and Over	50	251	20	398,279	443,464	79,656	88,693

* Note: Percentage factors have been rounded to the nearest percentage point.

Based upon a 95% confidence level, confidence intervals have been calculated for the three categories of 65 and over, 60 and over and 55 and over. For the 65 and over category, 17% responded positively. The confidence interval for this result is +/- 5%, which means that given the same survey sample size, the number of persons 65 years of age and over who are interested in garden suites will be between 12% and 22%, 95 times out of 100. For the 60 and over category, 19% responded positively, and 95% of the time, the confidence interval will be +/- 5% of this total (14% - 24%). Finally, for the 55 and over category, 20% responded positively, and with a 95% confidence level, the number of interested parties will be within a 15%- 25% range.

Figure 2



3.2.2 Host Families

To estimate the interest for garden suites arising from host families, the number of families who expressed an interest in the housing option has been scaled to eligible provincial homeowner totals. For the purposes of this study, eligible homeowners are represented by the number of single-detached houses which are owner-occupied. The 1986 Statistics Canada survey determined that there are 448,925 owner occupied, single-detached houses in the province. To arrive at a 1991 figure, the five year 1986-1991 population growth rate (partially derived by the Bureau of Statistics) of 6% was applied to the 448,925, assuming that population growth rate is indicative of the growth in the number of homeowners. By applying the positive survey response rate of 30%, or 16 out of the 54 total responses, potential interest for garden suites arising from host families is estimated at 141,086 for 1991.

In the same manner, estimates of eligible homeowners for 1996 have been determined by applying a growth factor of 12%, for the period of 1986 to 1996, to the 1986 totals. Thus, the 1996 potential host family interest (assuming a 30% positive response rate) has been calculated at 149,213.

It is important to recognize that with a 95% confidence level for these estimates, the range is 30% +/- 12%. This is too large a range to have any substantial confidence in the survey results.

3.3 Estimates of Potential Demand for Alberta

As was noted in Section 2.1, potential demand, for the purposes of this study, refers to the demand for garden suites which arises when the expressions of interest of a senior or host family can be matched with a corresponding host family or senior. Once again, factors such as cost and lot size have not been taken into account. These corresponding senior / host family linkages are represented by matched survey responses. However, as was also previously noted, the number of matched survey responses received is too small to be statistically valid and any resultant demand estimates would display an extremely low level of confidence and accuracy. Nevertheless, in the absence of any other factors or sources of information which could be used for estimating potential demand, an estimate, albeit unreliable, has been provided as interesting information.

In order to estimate potential demand, a positive response rate factor is required, Based upon the number of positive matched responses, this rate is 60% (3/5). However, this factor, which is applied to a base comprising the potential demand arising from seniors, is considered to be unrealistically high given the extemely small number of matched responses returned. Instead, it was assumed that the 27 out of 32 matched surveys which were not returned were negative responses. The three positive responses were then applied to the total 32 matched surveys mailed out for a positive response rate of 9%. This factor means that about 1 out of every 10 seniors interested in garden suites will find a suitable matched host family. When applied to the potential interest for seniors shown on Table 5, potential demand is estimated to be 7,169 for the 55 and over age group, 5,180 for the 60 and over age group, and 3,314 for the 65 and over age group.

3.4 Estimates of Potential Interest by Subset

Estimates of potential interest for the three remaining subsets are provided for the 55 and over age group. Also, because it was not possible to differentiate between Calgary and Edmonton responses due to a coding problem, the 118 total responses (18% positive) received were generally evenly distributed between the two communities. As was noted in Section 2.0, an additional 200 recoded surveys were mailed-out to Calgary and Edmonton in an attempt to circumvent the problem, but the response rate was negligible. Finally, although the same number of responses and population base totals are used for the different regions and the types of areas at the aggregate level, the potential interest figures for these subsets, when aggregated, differ from each other by about 5%. This is due to the application of different positive response percentage factors at the disaggregated level. However, the 5% variation is not considered significant.

Given the unreliability of the host family data when disaggregated by subsets, no attempt has been made to estimate interest arising from host families. As was noted earlier, a sample size of less than 30 is not large enough to provide statistically valid results, and all host family responses not at the aggregate level are smaller than 30. As such, raw survey scores will be presented only as interesting information. Also, because of the low level of accuracy and very limited number of responses, no attempt to estimate potential demand by subset has been made.

3.4.1 Potential Interest by Different Regions

1. Seniors

Estimates of potential interest by different regions of the province, including north, central and south, are shown on Table 6 and graphically portrayed in Figure 3. Predictably, because of its small population compared with the central and southern regions, the lowest estimate is for the northern region of the province. However, it is interesting to note that the north also displayed the highest positive response rate of 26%, compared with 19% for both the central and south regions. The potential interest estimates for these two regions are about the same.

Table 6

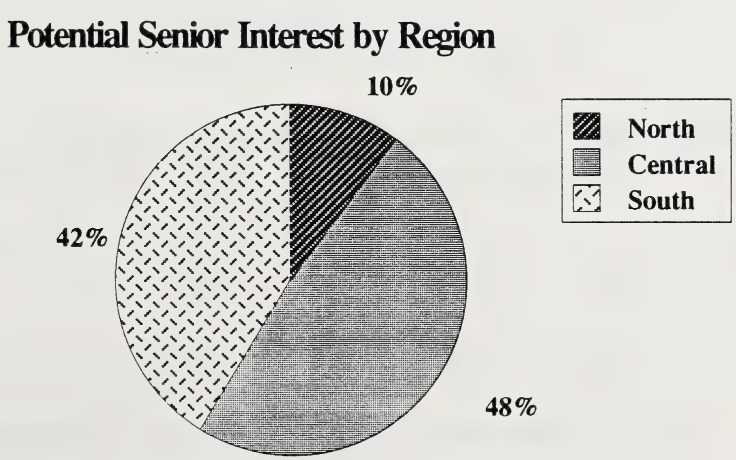
Estimates of Potential Interest
By Different Regions of the Province *

Region	Expressions of Interest			Positive	Base	Potential
	Yes	No	Total	% Factor	Population	Interest
North	11	31	42	26	30,368	7,896
Central	15	66	81	19	197,726	37,568
South	24	103	127	19	170,185	32,335
n/a **	0	1	1	0		
Total	50	201	251	20	398,279	

* Estimates are based upon survey responses received from seniors aged 55 and over.

** Location not known.

Figure 3



2. Host Families

Of the total 16 host families who expressed an interest in garden suites, 12% were from the northern region, 44% were from the central regional and 44% were from the south. As was the case with the seniors, the level of interest amongst host families is the same for the central and southern regions of the province.

3.4.2 Potential Interest by Type of Area

1. Seniors

Potential interest estimates by type of area, including urban, rural and semi-rural areas, are shown on Table 7. Figure 4 compares the estimates. Urban areas include all cities, towns, and villages, while semi-rural areas are those communities which contain significant acreage development (Counties and M.D.'s). Specifically, for the purposes of estimating potential interest, semi-rural areas include the following communities: County 25 (Leduc), County 31 (Parkland), M.D. 90 (Sturgeon), County 20 (Strathcona, not including Sherwood Park), M.D. 44 (Rocky View) and M.D. 31 (Foothills). Rural areas include those municipalites which are left over.

Table 7

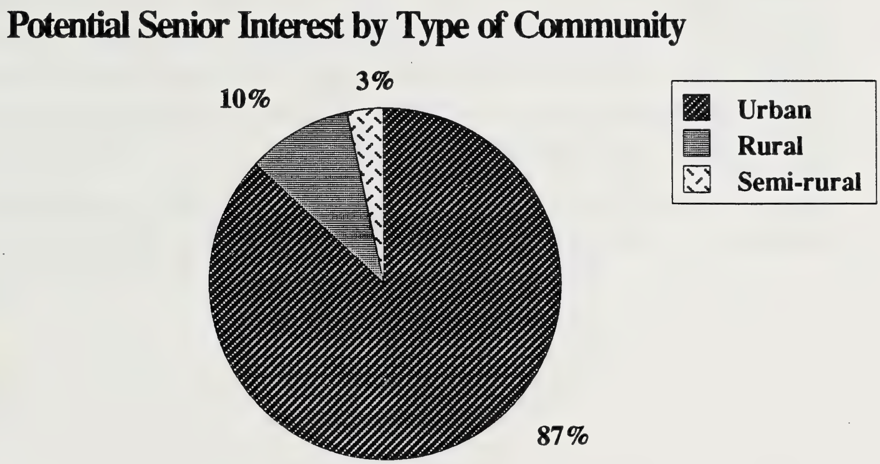
Estimates of Potential Interest
for Urban, Rural and Semi-Rural Areas *

Type of Area	Expressions of Interest			Positive % Factor	Base Population	Potential Interest
	Yes	No	Total			
Urban	33	126	159	21	335,287	70,410
Rural	9	50	59	15	52,017	7,803
Semi-Rural	8	24	32	25	10,975	2,744
n/a **	0	1	1	0		
Total	50	201	251	20	398,279	

* Estimates are based upon survey responses received from seniors aged 55 and over.

** Type of area not given.

Figure 4



Estimates of potential interest are highest for urban areas, primarily as a result of a higher base population level. The positive response rate also was higher for urban than for rural areas. The highest positive response rate, however, was for the semi-rural areas where 25% of the senior respondents expressed an interest in garden suites.

2. Host Families

The positive response rates resulting from the survey of host families are 63% for urban areas, 25% for rural areas and 12% for semi-rural areas.

3.4.3 Potential Interest at Different Rent Levels

1. Seniors

Table 8 indicates estimates of potential interest at different rent levels. These estimates are graphically portrayed by Figure 5. As was noted in Section 1.0, three different rent levels were selected for study purposes including $225, $425 and $700 per month. Once again, these levels are based upon the minimum per unit rate

for subsidized self-contained senior citizen apartment projects, average 1990 market rates for one bedroom apartment units and the economic rent for garden suites respectively. The base population figure used for estimating potential interest at these three rent levels corresponds to the total provincial potential interest estimate as shown on Table 5. Surprisingly, the survey responses indicate that the highest interest is at the $425 level rather than at the lower $225 rent level. Not surprisingly, however, is that a positive response rate of only 4% was received at the $700 economic rent level resulting in a potential interest of about 3,000 garden suites at this level. This low response rate, and the resultant interest estimate, is significant since levels of interest in the garden suite option are substantially affected when real economic rents are applied.

Table 8

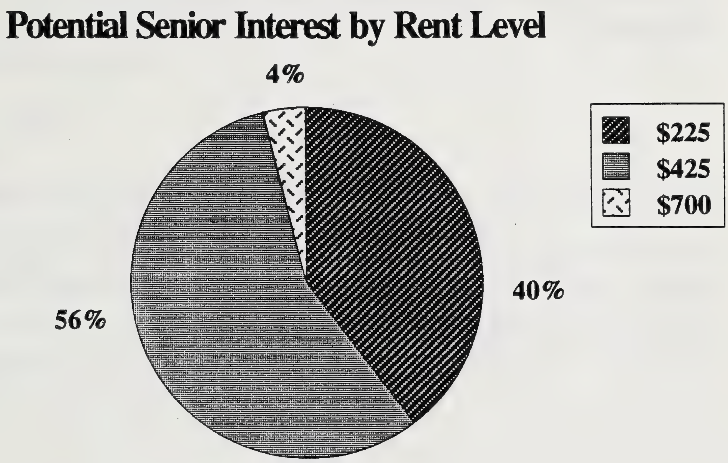
Estimates of Potential Interest
at Different Rent Levels *

Rent Level	Expressions of Interest By Rent Level	Positive % Factor	Base Population**	Potential Interest
$225	19	38	79,656	30,269
$425	27	54	79,656	43,014
$700	2	4	79,656	3,186
not given	2	4		
Total	50	100		

* Estimates are based upon survey responses received from seniors aged 55 and over.

** As per Table 5.

Figure 5



2. Host Families

Of the total host families who indicated an interest in having a garden suite in their backyard, 50% chose $425 as a fair rental rate, 19% chose $225 as a fair rate, 6% chose $0 as a fair rate, and 10% did not answer the question. Again, it is significant to note that no positive responses were received at the $700 rent levels.

3.5 Demand for Alternate Senior - Host Family Relationships

1. Seniors

Of the total seniors interested in garden suites, irrespective of age, all identified the relationship of the prospective host family. The majority of respondents (45/51 or 88%) chose their son or daughter as the host family. Of the remaining seniors, 6% (3/51) chose their niece or nephew and 2% (1/51) chose a close friend. The remaining 4% (2/51) wanted to place the garden suite on their own property and have someone else live in the house.

A second response was elicited from the questionnaire for an alternate household to accommodate the garden suite. Of the 51 interested seniors, 23 identified an alternate host family with the majority (74%) again choosing their son or daughter. Some 17% chose their close friend, 4% chose their grandson/granddaughter, and 4% chose their niece/nephew.

2. Host Families

Of the 16 host families who were interested in having a garden suite in their backyard, 13 identified their relationship to the senior. Nine out of 13 (69%) of respondents identified that they were a son or daughter of the occupant, three of 13 (24%) identified themselves as a grandson/granddaughter of the occupant, and one of 13 (7%) was a niece or nephew. Three of the 16 respondents identified an alternate relationship with an even split of 1/3 each for close friend, grandson/ granddaughter and son/daughter.

3.6 Implications and Conclusions

The estimates of potential interest shown on Table 5 vary significantly depending upon age group. The demand level at age 55 and over is more than double that of the 65 and over age grouping. This variance has major implications for marketing as it relates to minimum eligible age for garden suite occupants. However, in considering these variations, it is important to remember that the estimate for the 65 and over grouping is based upon the highest number of positive responses (40 out of 50) and, therefore, is the most reliable of the groupings. Only 7 of the 50 positive responses were in the 60 to 64 age group while only 3 such responses were received from seniors ages 55 to 59. This may be because the survey sample was skewed towards the 65 and over age group as a result of the sources used in identifying the sample. As such, even the cumulative estimates for the lower age limits are not very reliable. Nevertheless, they do provide some indicator of the impact on potential interest and demand which could result by varying the minimum eligibility age for garden suites. Also, it is important to remember that *the estimates represent levels of interest* rather than actual or effective demand and should be considered in that vein.

Another important factor which must be recognized in considering the potential interest estimates relates to the potential interest figures projected to 1996. These projections are based solely on population forecasts and do not take into account the impact on interest and demand over time of factors such as increased public awareness and effective marketing of the garden suite pilot project. The implications on demand of such factors is discussed further in the remaining sections of this report.

Although it is recognized that the potential demand estimates are not statistically valid, the estimates of between 3,000 to 7,000 garden suite units are interesting information and, if nothing else, do provide an indicator of demand. Of particular interest is the very substantial difference between the potential interest estimates, based upon expressions of interest by seniors, and the potential demand estimates, based upon the positive matched response rate. First, this substantial difference corroborates the premise made at the outset of the study that, in fact, the difference between interest and demand is great. Second, it is interesting to note that, as was born out by the experience of the pilot project, the degree of interest is drastically reduced when even a second level of commitment is required. This explains why only 32 matched responses, out of a potential 66 (50 senior and 16 host family positive responses), were mailed out. Furthermore, only 5 of the 32 mailed out were returned and, of these, nearly one half were negative.

In spite of this low response rate, it can be argued that if a strong interest lies with one party to the relationship, the likelihood of finding a match is increased. That is, if a senior is keen on living in a garden suite, he or she is likely to find an interested and suitable host family. Alternatively, if a host family is keen on the idea for a particular senior, the senior may well be persuaded to participate. However, although this may affect the demand level over the longer term as awareness of the concept increases, the results of this study do not support this argument.

As was noted in the preceding subsections, potential interest by different regions of the province is about the same for the more populated central and southern regions although the response rate was higher for the northern region. Interest by urban, rural and semi-rural areas generally reflects the distribution in population and interest was found to be highest at the $425 rent level. Not surprisingly, the lowest level of interest is for the $700 economic rent level. Potential interest at this level was only about 3,000 compared with about 43,000 at the $425 level and

30,000 at the $225 level. Obviously, the marketing implications of renting garden suites at the economic rent level are significant. Interestingly, the potential interest estimate at the economic rent level is in the same range as the potential demand estimates although different projection methods were used. Also of interest would be the impact on potential demand of applying the $700 economic rent level factor. None of the 3 positive matched responses identified $700 as an appropriate rent figure.

In addition to the most pertinent survey findings which have been used as a basis for estimating the various subsets of interest, some interesting information items arise from the detailed tabulations of senior and host family survey responses which are provided in Appendices VI and VII respectively. These information items may be of interest from a marketing perspective and are listed below.

A. Seniors

1. **Marital Status** - Nearly half (22/51) of the seniors who expressed an interest in garden suites were married and a similar number (23/51) were widowed. This would suggest that marital status is not a factor in terms of target marketing. However, since as many married persons as widowed expressed an interest, options in terms of size to accommodate married couples as opposed to single occupants could be considered. Interestingly, a similar breakdown also occurred between married and widowed persons who were not interested in garden suites further supporting the conclusion that marital status is not a factor in selecting the garden suite option.

2. **Health Status** - Nearly half of the senior respondents who expressed an interest in the garden suites rated their health as being good while a similar number rated it as satisfactory. Only 2 of the 51 rated their health as being poor. These responses are in keeping with the concept of garden suites wherein it provides a relatively independent lifestyle arrangement at the same time that some degree of care and service support can be provided by the host family on an as-needed basis. Of the negative responses, 54% rated their health as good while 40% rated it as satisfactory. Only 4% rated their health as being poor. These proportions generally correspond to those of the positive responses.

3. **Present Accommodation** - Some 60% of the seniors who expressed an

interest in garden suites presently reside in their own single-family homes. Most of the remaining respondents either reside in their own apartment or in a subsidized apartment project. Only two of the positive respondents presently reside with their families. This would suggest that the most likely user group to be interested in the garden suites is single-family home owners. Once again, the proportionate breakdown for negative respondents by type of accommodation generally reflects that of the positive respondents.

Interestingly, 70% (36/51) of the positive respondents indicated that they were satisfied with their present accommodation and 72% of these resided in their own single-family home. This would suggest that the garden suite is viewed as a desirable alternative to the single-family home and further supports target marketing current home owners. Not surprisingly, 90% of those respondents who were not interested in garden suites expressed satisfaction with their current accommodation and most of these reside in their own single-family homes.

4. **Reasons for Lack of Interest** - For those 213 seniors not interested in the garden suite, 19% were concerned about a loss of independence, 18% did not have a suitable relationship with a prospective host family, 17% stated that they are satisfied with their present accommodations, and 11% stated that the prospective location for a garden suite was not suitable. Eight of the 24 who sited unsuitable location specifically noted that the yard of a prospective homeowner was too small to accommodate a garden suite.

   When asked if there was anything that would make them change their mind, 40% of the 161 seniors who responded to this question cited health problems, while 30% indicated that nothing would cause them to change their mind. Cost, which was one of the choices listed on the questionnaire, was chosen by 14% of the respondents. Interestingly, only three respondents indicated that a suitable relationship or prospective host would be a factor which would cause them to change their minds. Likewise, only 3 seniors (2%) stated that the prospect of a suitable location (be it urban or rural) could change their mind. The only variable cited which could be controlled from a marketing perspective is cost.

5. **Reasons for Interest** - The reasons given by the positive respondents for wanting to live in a garden suite are: to be close to family (80%), for

companionship (39%), concern with security (29%), concern with health (27%), to help the host family (27%), and concern over daily care (24%). These responses suggest that proximity to family may be the most valuable feature to promote from a marketing perspective.

6. **Affordable Rent Levels** - Of the 51 respondents who expressed an interest in garden suites, 25 indicated that their current rent levels are affordable, 5 indicated they are not affordable and 21 did not respond. Forty four percent of those who considered their rent levels affordable listed their monthly rent as being in the $225 to $424 range, 28% listed the $425 to $699 range and 4% listed more than $700 per month. Four of the five respondents who indicated that their current rent is not affordable pay between $425 and $699 per month while the remaining respondent reported a monthly rent level in excess of $700. These responses suggest that most of the seniors interested in garden suites find their present accommodation affordable at the $225 to $425 level. This is not to say, however, that they could not afford a higher rent level.

   For those 213 respondents not interested in a garden suite, 94 did not respond to the question on affordability. Of the 119 who did respond, an overwhelming 97% indicated that their current rent level is affordable. Again, some 40% of these respondents pay monthly rents of between $225 and $424, 29% pay between $425 and $699, 22% pay less than $225 and 5% pay more than $700. These responses generally reflect the responses of those seniors who expressed an interest in garden suites.

7. **Relationship with Host Family** - As was noted in Section 3.5, an overwhelming 88% (45/51) of the senior respondents identified the property of a son or daughter for accommodating the garden suite. Three respondents identified a niece or nephew, one identified a close friend and two noted their own property. These response frequencies support the current garden suite concept in terms of appropriate relationship. Seventy four percent of those seniors who identified another family to accommodate a garden suite chose another son or daughter and 17% identified a close friend. Again, the relationship as defined by the current concept appears most popular. Interestingly, grandson or granddaughter was noted as an alternate host family by only one respondent. This may be a reflection of the age group which are likely to be homeowners (grandchildren may not be at a home

owner stage of life), or the closeness of the relationship.

8. **Host Family Willingness** - Some 88% of the seniors who responded positively to the questionnaire felt that the host family they identified would be willing to accommodate a garden suite in their yard. The remaining 12% did not respond. No respondents felt the host family would not be willing to accommodate the suite. The very positive and confident responses to this question suggests that the seniors already have a close relationship with their prospective host families. The 12% of non-responses could represent uncertainty in this regard. "Peace of mind" was the reason most seniors gave when asked why the host family they had in mind would be willing to accommodate a garden suite.

9. **Alternate Housing Options** - Of the 19 positive respondents who indicated that they are presently looking at alternate housing options, 12 indicated that they are contemplating a government owned subsidized senior apartment unit, 4 are considering their own apartment, 3 are considering other options, and 1 is considering his/her own home. Most of these options involve a rental payment of about $425 per month. This $425 rent level was also selected most frequently as being reasonable for garden suites and results in the greatest potential interest.

10. **Important Housing Choice Elements** - As a final question, seniors were asked to rank five elements in order of importance for choosing a type of housing. The elements most frequently selected in descending order of importance were proximity to family, independence, security, privacy and cost. Proximity to family, the element most frequently chosen, is a major selling feature of the garden suite. Interestingly, cost was the lowest ranked element. For those respondents who were not interested in garden suites, cost also did not rank high as a factor which could change their minds.

B. Host Families

1. **Age** - Nearly 75% of the total 54 host family respondents were between 25 and 49 years old. Of the 16 positive respondents, approximately one half were in the 30 to 39 year age category. This would appear to be the most

likely group to target for marketing purposes.

2. **Relationship With Senior** - Most of the interested respondents who identified their relationship with a prospective garden suite occupant were either the son or daughter of the prospective occupant. This corresponds to the responses received from the seniors questionnaire and, once again, supports the suitability of the relationship defined by the current garden suite concept.

3. **Lot Size / Amenity Space** - Close to 70% of the families interested in a garden suite indicated that their lot is large enough to accommodate a garden suite unit. Close to 55% of those not interested indicated their lots are sufficiently large. Nevertheless, when asked why they are not interested in a garden suite, reduced yard space was the most frequently cited of the five choices provided. The impact on amenity space is obviously an important factor in considering the garden suite option, even where lots are sufficiently large to accommodate a garden suite unit. Furthermore, even for those families interested in a garden suite, reduced yard space was the most frequently cited misgiving.

4. **Other Reasons for Lack of Interest** - The wrong relationship with the senior was the second most frequently cited reason for lack of interest. Of the 23 host families who responded to the question on what, if anything, would change their minds, most cited reduced independence of the senior.

5. **Reasons for Interest** - The two reasons most frequently given for being interested in the garden suite were to have the senior nearby and for social contact. In other words, for host families as well as for seniors, proximity is the garden suite's greatest selling feature.

6. **Financial Support** - Only two of the 16 host families interested in garden suites expected to provide the senior with some financial support. Both quoted about $200 per month as the anticipated extent of such support.

7. **Other Options** - A government owned seniors apartment unit was the most frequently noted other option considered for the senior by the host families who responded positively. This response frequency corresponds to a similar question included in the senior questionnaire and suggests that from the perspective of the host family, the garden suite is seen as an option more to subsidized apartment units than to any other form of housing.

8. **Neighborhood Acceptance** - It is interesting to note that all of the families who expressed an interest in garden suites indicated that they would have no objection to the placement of such a unit in the backyard of a neighbor.

It is important to recognize that the foregoing factors can be expected to significantly impact effective take-up demand for garden suites. In particular, factors such as lot size and price will result in an effective demand figure which is substantially lower than the estimates of interest contained herein. The implications of such factors on effective demand are discussed in Section 6.0.

4.0 *Findings for Secondary Stakeholder Group*

4.1 Input from Planning and Municipal Approving Authorities

Some fourteen participants, representing eight different planning and municipal approving authorities, attended the Lethbridge discussion forum. The Parkland forum was attended by twenty eight participants representing thirteen authorities. Five written responses to the issue paper also have been received and reflect the input provided at the forums.

Without exception, the forum participants supported the garden suite concept in principle. Yet, the majority of participants simply did not know what sort of demand, if any, exists in their respective municipalities. Most felt that if there is any demand, it must be extremely limited at this point in time. Exceptions include the two pilot project municipalities where expressions of interest are more evident. This would suggest that demand is affected by local awareness and familiarity with the concept. However, even in these two municipalities, demand is not extensive and, based upon the experience of the pilot project, expressions of interest cannot be directly translated into effective demand. In Lethbridge, according to the representative of the Lethbridge Housing Authority, "there are ten to twelve serious applications currently on file. Enquiries from the entire Lethbridge region are more numerous since placement of the pilot project units. However, the number of enquiries is not that great, certainly not in the hundreds." In Parkland, the Meridian Foundation receives four to six enquiries per month. In all other areas, forum participants reported that calls of interest were either negligible or nonexistent.

This reported lack of interest is common in all three regions of the province, including north, central and southern regions, and in rural, semi-rural and urban municipalities alike. Interestingly, strong opposition to garden suites and, therefore, limited demand was envisioned in the semi-rural country residential communities where density is of greater concern than in urban areas. Increased density is a common and relatively accepted occurrence in most urban areas. This is not the case in country residential areas and, for many residents, density may have been a determinant in selecting a semi-rural lifestyle. Also of interest is that some rural and semi-rural communities receive numerous applications for exemptions to Section 78 of the Planning Act to allow for a second unit to accommodate children and/or grandchildren while the parents and/or grandparents maintain occupancy of the principal dwelling. An amendment to Section 78 is presently being considered

by the Alberta Legislature which would transfer the power to allow a second unit on a lot from the Alberta Planning Board to local municipalities. This transfer of power to the municipality could potentially influence demand at the local level.

Two additional factors were considered critical in affecting demand. First, it was suggested by numerous participants that a significant number of semi-rural and urban municipalities would oppose garden suites because they are manufactured. The negative perceptions and attitudes towards "mobile homes" remains strong in these municipalities. Such attitudes would affect both acceptance of, and demand for, the type of units used for the pilot project. This did not appear to be an issue in rural areas. Second, it was felt that demand could be increased in the future through effective marketing and packaging of both the concept and unit. Effective marketing may even overcome negative attitudes towards garden suites as manufactured housing units. Also, it was felt that a limited number of units, sensitively introduced through a provincial program, would result in increased awareness, acceptance and demand. The experience in both Lethbridge and Parkland support this contention. It was suggested that the province consider introducing a limited program initially to spur interest and demand. In the longer term, once a viable market is established, the private sector could become involved.

Input on demand in relation to size of community, size of senior population, subsidized housing options, and cultural variations and values was not obtained. Again, the forum participants simply did not know if these factors have any impact on demand.

However, input was provided on the appropriate minimum eligible age for garden suite occupancy and suitable occupant/host family relationships. The majority of the forum participants concurred that, initially, the minimum eligible age should be 65 years and that the relationship should be restricted to immediate family. Notwithstanding these opinions, many felt that over the longer term, serious consideration should be given to expanding the eligibility criteria to include handicapped persons under 65 years of age and to broadening the relationship base to include more distant family and close friends.

4.2 Input from Senior and Related Organizations

Of the 32 organizations on the mail-out list, 21 responded. The remaining eleven either could not be reached after three attempts or did not wish to respond. Overall, the responses were similar to those obtained from the planning and municipal authorities. Most respondents felt there was extremely little if any demand. Only one respondent felt there was "some" demand. Not surprisingly, this respondent represented a Lethbridge seniors' organization adding further support to the contention that demand may be affected by local awareness and familiarity.

Once again, as was the case with the municipal authorities, most respondents felt the garden suite concept to have merit as a form of housing for older Albertans. However, a significant number also felt that it was not needed and that existing options are more than adequate. A comment frequently made was that seniors are very independent as a general rule and do not want to "be stuck in anyone's backyard." Such views do not fall within any specific categories of geographic regions or type of community. Also, responses did not appear to be affected or vary in relation to size of community, size of senior population or local cultural variations. On the whole, very little concrete information, even in the form of firm opinion, was elicited from the survey of seniors' organizations.

Responses to the two most critical questions are summarized on Table 9 according to geographic sector and type of community. The two critical questions were:

1. Do you feel there is a demand for garden suites in your area?
2. Do you feel that this demand, if any, is minimal or fairly extensive?

It should be reiterated that although the seniors' organizations approached are located in urban communities, most also serve the surrounding rural community and this factor was recognized and acknowledged during the survey process.

Table 9

Summary of Responses to Questions on Demand

Region / Community	No Demand	Limited Demand	Some Demand	Unknown	Total
North/Urban	1	-	-	-	1
North/Rural	1	-	-	-	1
Central/Urban	3	3	-	-	6
Central/Rural	2	1	-	1	4
Central/ Semi-Rural	1	1	-	-	2
South/Urban	2	1	1	1	5
South/Rural	-	1	-	1	2
South/ Semi-Rural	-	1	-	-	1
Total	10	8	1	3	22

Of the fourteen representatives who responded to the question of whether or not current housing options in your community adequately meet the needs of the older population, all but one replied in the affirmative. The one negative response came from Spruce Grove. Interestingly, a recent article in the January / February 1991 issue of the Municipal Councillor indicated that the City of Spruce Grove has recently identified a need for more accommodation and facilities for its senior population. The remaining eight representatives surveyed did not know and, therefore, could not respond to this question. One respondent from the Town of Hanna noted that although Hanna has adequate accommodation for seniors, this may not be the case in some smaller villages and hamlets. Four other respondents made similar observations and suggested that rural and semi-rural communities have no options for seniors. These same respondents, however, also indicated that there was no evidence of demand for garden suites from such communities.

In response to the question of whether or not garden suites would compete with or complement existing options, three respondents felt garden suites would compete

with and three felt they would complement such options. The remaining fifteen did not know and could not respond.

Of the eight representatives who responded to the question of whether or not the garden suite would be accepted by the community, five, including a Lethbridge respondent, felt they would be accepted. Problems identified which could result in lack of acceptance included the size of lots in urban areas and lack of demonstrated need. More than half (14) of the respondents could not answer this question.

Nine out of the ten representatives who responded to the question of a desirable relationship between the occupant and host family stated that any relationship is acceptable as long as it is a close one. Only one representative responded that the relationship should be limited to immediate family.

Twelve representatives responded to the question dealing with appropriate minimum age for garden suite occupants. Three of the twelve felt the minimum age should be 50 years, two felt is should be 55 years and one suggested 60 years. The remaining six respondents (50 %) felt that the minimum age should be 65 and over and anyone less than 65 with a demonstrated need as a result of a physical or mental handicap. Interestingly, none of the respondents felt that garden suite occupancy should be limited just to seniors 65 years and over. Also of interest are the views of one Edmonton respondent who felt that many seniors over 65 have already made their decision with respect to lifestyle and type of accommodation and that the demand for garden suites will come from the 50 to 65 year olds who are still considering their retirement housing options. This same individual pointed out that most seniors presently living in single-family dwellings have taken full advantage of the provincial government's home improvement grant programs and intend to remain in their homes until they are infirm. The final move for these seniors would be into a lodge, nursing home or auxiliary hospital. This comment is supported to some extent by information drawn from the Household Income Finances and Equipment (HIFE) survey undertaken by Statistics Canada. The survey indicates that approximately two thirds of Albertans aged 65 years and over live in housing that they own and that the majority of the housing owned is single-family.

4.3 Implications and Conclusions

The results of the survey of the secondary stakeholder group suggest that there is little, if any, known demand for garden suites. Few indicators of demand, such as expressions of interest, requests for information, lack of other suitable housing options, or requests for a second dwelling or for building permit applications to build additions to accommodate a senior family member are evident. This lack of evident indicators is common to all regions of the province and to all types of communities, be they urban, rural or semi-rural. The only two exceptions are Lethbridge and Parkland where some demand, albeit not extensive, appears to exist. The local awareness and familiarity of the garden suite concept resulting from the pilot project is no doubt the reason for this increased demand. Also, some senior organization representatives felt that the demand for garden suites may be greater in rural than in urban areas but could offer no evidence to that effect.

On a cautionary note, is should be remembered that although the central and southern communities of the province were relatively well represented by the survey, the findings related to the northern portion of Alberta are based upon the opinions of only four individuals. Two of the four are representatives of the City of Fort McMurray and two represent seniors' organizations, one in Peace River and the other in Bonnyville. Nevertheless, recognizing the relatively small population of this region as compared to the rest of the province, and the survey approach, these opinions may indeed be valid, particularly since they reflect the opinions of the representatives of the central and southern regions.

Other relevant survey findings which may influence demand are as follows:

1. **Minimum Age** - Representatives of planning and municipal approving authorities generally concurred that the minimum eligible age for garden suite occupancy should be 65 years but that, over the longer term, serious consideration should be given to expanding the eligibility criteria to include handicapped persons under 65 years of age. Half of those representatives of seniors' organizations who offered an opinion on this question agreed that 65 years is an appropriate minimum age and that the eligibility criteria should also include handicapped persons under 65 years of age.

2. **Occupant / Host Family Relationship** - Once again, planning and municipal approving authorities considered an immediate family relationship to be appropriate initially but that, in future, consideration be given to broadening the relationship base to include more distant family and close friends. All but one of the representatives of the seniors' organization felt that the only criterion which should apply to the relationship between the occupant and host family is that it be a close one and include friends as well as family.

3. **Community Acceptance** - Many of the representatives of planning and municipal approving authorities did not know how their respective communities would respond to garden suites. Most felt that the public would be very accepting of the concept as proposed by the pilot project, but could foresee problems related to the type of unit and the potential increase in density. The negative perceptions of many urban and semi-rural municipalities towards manufactured housing units could affect the degree of local acceptance and, therefore, demand in such municipalities. The potential increase in density was cited as a factor which could negatively influence community acceptance and perceptions towards garden suites, particularly in low density areas such as country residential subdivisions. Most representatives of seniors' organizations did not anticipate any problems related to community acceptance.

5.0 *Findings - Other Information Sources*

Three other sources of information were investigated to obtain relevant input for estimating demand for garden suites. Most of the information is qualitative in nature and, therefore, serves as interesting indicators of demand. The information has been used in this vein and is summarized below:

5.1 Housing Information

Information on senior citizen subsidized self-contained housing projects was obtained from Alberta Municipal Affairs for the case study municipalities to determine if there is any correlation between local demand for garden suites as identified by the survey of secondary stakeholder groups and the availability of self-contained housing units. In fact, no shortages of self-contained units were noted by any of the representatives of the secondary stakeholder group excepting one seniors' organization respondent from Spruce Grove. This individual felt that current housing options for seniors in that community were not adequate in that more self-contained units and other more intensive types of care facilities were required. However, this same individual also felt that the local demand for garden suites was minimal, if at all. Interestingly, vacancy rates for the 30 unit self-contained Spruce Grove housing project have varied between 0% and 3% since 1987 which, in isolation, does suggest the number of units may not be adequate. However, a recently completed project in Stony Plain brings the total number of self-contained units in that community to 103. Stony Plain and Spruce Grove fall under the auspices of the same housing authority and serve the same general region, including the County of Parkland, which is the applicable case study municipality. Comments received from Stony Plain representatives and the housing authority suggest that the region is well served with seniors housing. In fact, as was previously noted, none of the remaining secondary stakeholder group representatives felt that any of the case study municipalities suffered from a shortage of self-contained units although the need for more intensive care units was noted by home care representatives. Several respondents also stated that the housing needs of seniors are very well looked after and that more options are needed for other underprivileged groups. The availability of adequate seniors housing options was the reason most often cited for why there is no local demand for garden suites.

According to Alberta Municipal Affairs, the number of social housing units occupied by seniors province-wide is well over 25,000 and some 15,000 of these

are self-contained. With a 1990 senior population of close to 300,000, this represents one unit for every 20 seniors. As of June, 1990, the vacancy rate for self-contained units was 6% overall which, on a province-wide basis suggests that the number of self-contained units is adequate to meet the demand. Based on the survey responses, this conclusion can be applied locally to all of the case study municipalities.

5.2 Calls of Interest

Information on general calls of interest with respect to garden suites was provided by Alberta Municipal Affairs and the Manufactured Housing Association of Alberta and Saskatchewan. The Housing Division of Municipal Affairs reported receiving, on average, two to three calls of interest per week after the pilot project units were placed. Once the existence of the project and the units became publicized through the news media, weekly calls increased to eight to eleven on average for a period of about five months. The number of calls then tapered off once again to two to three on average. No identifiable patterns were evident as to the geographic locations or type of community the calls were received from although there did appear to be a slight predominance in calls from acreage owners and rural locales. Also of interest, is that most of the calls were from prospective host families and most were expressions of serious interest in that the garden suite would offer the best solution to a particular problem. The increase in calls which occurred following the publicity related to the pilot project supports the feedback received from several secondary stakeholder group respondents that increased public awareness will result in increased interest in, and demand for, garden suites. Evidence of this effect is obvious in Lethbridge and Parkland.

Further evidence is available as a result of the dramatic increase in calls of interest received by the Housing Division since the first of March, 1991, about one month after the surveys for this study were mailed out. Between March 1 and March 22, eleven such calls were received. Again, public awareness appears to play a significant role in the level of interest in garden suites. Nevertheless, the total number of calls received since placement of the pilot project units is still only about 300.

The Manufactured Housing Association also has maintained an inventory of calls of interest related to garden suites. As of December 31, 1990, 32 such calls had been recorded. As is the case with those calls received by the Housing Division, these

enquiries do not follow any identifiable locational patterns although no calls were received from the northern regions of the province. The lack of enquiries from the north is in keeping with the lack of interest perceived by the secondary stakeholder group respondents from that region. The Housing Association also recorded the names and addresses of persons who attended the garden suite displays sponsored by the Association which were held in 1990 in Calgary and Edmonton, and who expressed an interest in the units and wanted to be kept updated on the pilot project. Not surprisingly, most the of 650 interested persons are from the Calgary and Edmonton areas. Although these figures provide an indicator of interest, they cannot be interpreted as constituting actual demand.

5.3 CMHC National Market Survey

A national garden suite market survey was undertaken in 1988-89 by Gallup Canada Inc. on behalf of Central Mortgage and Housing Corporation. This survey was based on a sample comprised of visitors to garden suite exhibits and persons selected at random from telephone books. Over 33,000 persons were screened for survey purposes and 1,962 interviews of potential hosts and occupants were completed across the county. In Alberta, 252 such interviews, including 92 for seniors aged 60 years and over, and 160 for host families, were completed. It should be noted that the interviews were primarily geared toward determining eligibility as opposed to interest. The percentage of respondents who qualified as potential occupants and host families was then applied to the total population of the two groups to obtain total potential market, not demand or interest. On this basis, the potential market, defined as the absolute highest number of occupants and host families, is 160,000 and 539,000 respectively. These figures are not cumulative since there will be duplication in the numbers.

The study concludes that the percentages of host families who are likely to place a unit in their yards is 29 % of the total potential market and that only 8% of these families are very likely to do so. This translates into over 43,000 families who are likely to place a unit. However, the study further identifies a host of other factors which must be taken into account in defining demand, such as lot size, awareness, price and neighborhood acceptance.

Recognizing the parameters of the CMHC study, the initial potential market figures are not comparable to demand as defined by this study and, therefore, these figures are not valid for comparison purposes. However, some recent internal work by CMHC on garden suite demand, based upon the Gallup study results, information

from CMHC's Potential Housing Demand Projection Model and other factors such as the likelihood of families to place a garden suite in their yards, suggests a demand of about 6,000 to 7,000 garden suites for Alberta. This demand range is more in keeping with the estimates of effective demand identified in Section 3.0.

5.4 Implications and Conclusions

The foregoing information on the existing self-contained subsidized housing inventory, calls of interest related to the garden suits and the CMHC market study result in the following implications for demand as determined by this study:

1. There appears to be no shortage of subsidized self-contained housing units in any of the case study municipalities or on a province-wide basis. Demand for garden suites, therefore, will not be increased as a result of a shortage of these housing options. On the contrary, these other options, primarily the self-contained units, may limit demand for garden suites. In reality, such demand likely will stem from the merits of the garden suite as one of a number of seniors' housing options.

2. In spite of a reported lack of interest, as expressed by the respondents from the secondary stakeholder groups, a steady interest in garden suites is evident based on calls received by the Housing Division of Alberta Municipal Affairs and the Manufactured Housing Association. This would suggest that the survey respondents are simply not aware of the interest which obviously does exist and that their views, and the basis for those views, may represent a worst case scenario. In other words, they may not be aware of the "whole picture". Nevertheless, although the calls do indicate some demand, the numbers are not substantial.

3. The initial CMHC market study provides estimates of total potential market size, rather than demand, and the information should be used accordingly. The study acknowledges that demand is substantially lower than potential market size and is dependent on many interrelated complex factors. A key factor identified in terms of affecting demand is level of awareness. The importance of awareness is supported both by the input obtained from the secondary stakeholder groups and the increase in calls of interest which occurred following media attention on the pilot project and the distribution of the survey instruments for this study.

6.0 Conclusions

Potential interest, estimated at about 80,000 units for the 55 and over age grouping, should not be interpreted as representing demand for garden suites. However, these estimates of potential interest are a valid measure of market opportunity and should be considered in that regard. Potential demand for the same age group has been estimated at about 7,000 units. Although not a statistically reliable figure, this demand estimate nevertheless provides an indicator of effective demand for a number of reasons. These reasons are as follows:

1. Experience and other studies have proven that the very significant difference between the potential interest and demand estimates determined by this study are valid and that the difference increases with each additional level of commitment required. In other words, the greater the level of commitment, the lower the demand. The most telling statistic in this regard is the extremely low number of matched survey responses received throughout the course of the study, this in spite of follow-up attempts to solicit a higher response rate.

2. The relatively low estimate of potential demand arising from the survey of the primary stakeholder group reflects the input received from the survey of the secondary stakeholder group. With minimal exception, the latter group considered the demand for garden suites in their respective areas to be limited or non-existent. The only exceptions were in the two pilot project municipalities of Lethbridge and Parkland. Demand was considered to be more evident in these municipalities as a result of the pilot project. The increase in the number of inquiries received by Alberta Municipal Affairs which followed unit placement and other pilot project activities, including this study, corroborates this input. And yet, only 5 of 175 senior surveys (3%) and only 1 of 45 host family surveys (2%) were returned from Lethbridge. Although the response rates for Parkland, including 7% for seniors and 11% for host families were somewhat higher, the survey results nevertheless appear to belie the input of the secondary stakeholder group as it pertains to the importance of local awareness in stimulating interest in garden suites. Also, although the number of calls of inquiry did increase at peak awareness times since the placement of the pilot project units, the total number of inquiries received to date is still only about 300.

3. Interestingly, the potential demand estimate of about 7,000 units is in the same range as the potential interest estimate of 3,000 units at the economically feasible $700 rent level. This would suggest that price will play a major role in determining effective as well as potential demand and that a potential demand estimate of even 7,000 units may be optimistic if economic rents are applied since this estimate is valid only at, or below, market rents, not at economic rent levels.

4. Lot size and the impact on amenity space, are other factors which are likely to have a significant bearing on effective demand. Some 40% of the total number of host family respondents and close to 30% of the positive respondents indicated that their lot size is too small to accommodate a garden suite. Even more importantly, reduced amenity space was the most frequently noted misgiving of those interested in garden suites. Such misgivings can be expected to significantly affect demand levels for garden suites.

5. Neighborhood and community acceptance of the manufactured garden suite unit was cited by a significant number of the secondary stakeholder group respondents as a deterrent to the garden suite concept and, therefore, to demand. Although most communities in Alberta permit manufactured housing units in certain designated locations such as mobile home parks, strong opposition to integrating such units into traditional single-family neighborhoods, regardless of their purpose, was envisioned by representatives of urban and semi-rural areas alike. Similar reservations were not expressed for rural areas. Nevertheless, the survey of the primary user groups indicates that most of the potential demand for garden suites stems from the urban, not the rural, areas of the province.

6. Increased awareness of the garden suite concept can be expected to play a significant role in generating demand for garden suites in the future. This is evident form the increased number, albeit limited, of calls of interest received by Alberta Municipal Affairs at key intervals throughout the pilot project process. Also, although not supported by the survey results of the primary user group, the increase in local interest perceived by both the Lethbridge and Parkland secondary stakeholder group respondents suggest that increased awareness may result in greater demand for garden suites, *in time*. Furthermore, the conclusions of the CMHC market study stress the importance of awareness

of the garden suite concept in terms of market potential. In particular, the positive effect on personal impressions of the concept as a result of having visited a demonstration site and seen the product was highlighted. The large number of persons who were interested in receiving more information on the concept at the recent exhibits sponsored by the Manufactured Housing Association in Calgary and Edmonton lends considerable credence to the CMHC conclusion. The positive impressions made by such exhibits may go a long way towards promoting community and neighborhood acceptance. The strong support for the concept voiced at the discussion forums by community leaders and elected officials from Lethbridge and Parkland who are familiar with the concept is an indicator in this regard.

7. Like awareness, marketing can play a major role in generating demand. A strong target marketing campaign, combined with a comprehensive awareness program, can have a major impact on take-up demand. Some of the participants at the discussion forums felt that a strong show of support for the garden suite concept from the province would assist in this regard and would add considerable weight both for marketing purposes and for building awareness.

8. Although the participants at the two garden suite discussion forums and the representatives of the seniors' and related organizations felt demand for garden suites was very limited and that many problems still needed to be resolved, without exception, the garden suite concept was considered to be a good housing option for some seniors. Such support will inevitably generate local interest and, in time, demand for this housing option.

9. From the outset of this study, it was clear that effective demand for garden suites would be difficult to measure since garden suites are more than just a simple market product. In fact, the garden suite is a lifestyle option affecting many parties and involves a major decision which, for most families, will be made only once or twice in a lifetime. Furthermore, it is an option which must be prepared for and cannot be decided upon on the spur of the moment. A significant level of commitment is required by both of the principal parties involved as well as the community. This may explain the low number of matched survey responses which were received. The small number is consistent with the pilot project experience wherein most of the families which initially applied to participate in the project withdrew upon further consideration.

Based upon the preceding factors, and in the absence of other statistically valid information, the effective demand for garden suites in Alberta by 1996 in the 55 and over age group, if rents do not exceed market rents substantially, is estimated to be 7,000 units. Under these conditions, effective demand in 1991 is estimated to be substantially lower, in the order of 3,000 units. Further, eligible age is a significant factor. As was noted in Section 3.0, demand among the 65 years and over group could be only half of the demand for the 55 years and over group, resulting in an effective demand of 1,500 units now and some 3,000 units in 1996, if the eligible age for garden suites was limited to 65 years and over., Although it is recognized that these estimates are not statistically valid, they do provide an indicator of the implications on demand of applying different age categories.

Appendix I

Case Study Municipality Selection Process

Selection of Case Study Municipalities

Initially, nine communities which are considered to be provincially representative were selected for administering the demand study. A two level approach was used in selecting these communities. The first level involved applying the two selection criteria considered to be most significant for ensuring province-wide representation when estimating effective demand. These primary selection criteria include geographic location within the province (north, central and south) and type of community (urban, semi-rural and rural). The combination of the two primary criteria, and the six resulting parameters, provides the initial rationale for selecting nine communities. The breakdown of communities based upon this first level of selection is illustrated in the chart below. Included in the breakdown is an urban, semi-rural and rural community for each of the three geographic segments of the province.

	North	Central	South
Urban	1	2	3
Rural	4	5	6
Semi-Rural	7	8	9

This initial breakdown was then modified, in consultation with the steering committee, to include only two semi-rural communities and to increase the number of urban communities to four. The number of rural communities remained at three. The reasons for the modification are as follows:

- For the purposes of this study, semi-rural communities are defined as those which contain a significant amount of acreage development. In Alberta, such communities exist only in close proximity to the province's two major cities including Edmonton, which is centrally located, and Calgary, which is located in the southern portion of the province. No comparable semi-rural communities are located in the north. Only two semi-rural communities, therefore, are required to ensure geographic representation.

- The preliminary assessment of the pilot project determined that garden suites are likely to have a greater impact in urban than in rural areas. Also, some 80 percent of Alberta's total population is concentrated in urban communities. The implications of, and demand for garden suites, therefore, is expected to be greater in urban than in rural areas.

Because the majority of Alberta urban communities are concentrated in the central segment of the province, for selection purposes, this segment was further divided into north/central and south/central to ensure optimal geographic representation. Also,

because of their active participation in the pilot project, the City of Lethbridge was selected to represent the south/urban community and the County of Parkland was selected as the central/semi-rural community. The selection of these communities allowed for some comparative analysis of the impact on demand resulting from increased local awareness and interest which may have been generated by the placement of the five pilot project garden suite units.

The remaining seven representative communities were identified using the second level of the selection approach. This level of selection involved the application of the following selection criteria:

- size or population of the community;
- population age breakdown of the community;
- age and historic development of the community; and
- income levels in the community.

Application of the foregoing criteria resulted in the selection of the communities listed and described below. The communities are listed according to the geographic location and type of community they are intended to represent. The table which follows summarizes the pertinent selection information for each community.

Lethbridge and Parkland have been included to provide for a complete listing. It should be noted that for this final level of selection, the need to ensure that communities of different sizes were represented in the market survey was considered to be particularly significant in that size often is a key determinant of how communities function, of social programs and facilities, and of local attitudes and perceptions. Size also is relevant in that communities selected for survey purposes must be large enough to contain an adequate sample.

1. Town of Peace River - North / Urban

The Town of Peace River was selected to be representative of a northern, urban community. It also was selected to represent the 25 larger Alberta towns which display a range in population size of between 5,000 to 10,000 persons. Although an established community, it is somewhat representative of northern resource towns as is indicted by its population breakdown. Only six percent of the population is over 55 which is indicative of the relatively young population commonly found in resource towns. Income levels reflect its resource/agricultural based economy.

2. City of Edmonton - North Central / Urban

The City of Edmonton was selected to be representative of a north central urban community. It also was selected because it is representative of one of Alberta's two major cities and, because of its size, represents a substantial potential market for garden suites. Its population age breakdown and income levels are typical of a large city. The significant variety in neighbourhood structure and character may prove qualitatively interesting in identifying demand for garden suites.

3. Town of Hanna - South Central / Urban

The Town of Hanna was selected to be representative of a south central urban community and the 84 small Alberta towns which have a population of less than 5,000 persons. Hanna also is a typical prairie agricultural service centre with a significant older population (28 percent of total). As is also typical of many agricultural service centres, many of these seniors formerly farmed the surrounding countryside.

4. City of Lethbridge - South / Urban

As was previously noted, Lethbridge was selected for administering the survey because of its active participation in the pilot project. Two of the five pilot project units have been placed in Lethbridge. The community is also representative of a mid-sized Alberta city which is far enough removed from the major metropolitan area of the province to not be influenced by those areas. The City is typical of established, older communities of its size in terms of population age breakdown and income levels.

5. County of Parkland - Central / Semi-Rural

Again, as was previously noted, Parkland is one of the active participants in the pilot project and was selected for that reason. Two of the remaining three pilot project units are located on acreages within Parkland while the third is located on a large rural holding. Parkland's population reflects its substantial acreage development and semi-rural development pattern. Its population of 21,000 persons makes it the second largest rural municipality in Alberta. The County of Strathcona is the largest. However, much of Strathcona's population is concentrated in Sherwood Park. The rural population component of the two counties is about the same. Parkland's development pattern make it an ideal candidate as one of the two semi-rural case study municipalities. The urban communities within the County which serve its older population are Spruce Grove and Stony Plain. Stony Plain is particularly significant in this regard.

6. Municipal District of Foothills - South / Semi-Rural

The Municipal District of Foothills was one of two prospective candidates to represent semi-rural communities in the southern portion of the province. It was selected instead of the Municipal District of Rocky View because its population is about half that of Parkland whereas Rocky View's is of a similar size. In spite of its smaller population, however, Foothills does contain a significant amount of acreage development and nearly twice the proportion of older persons to total population as Parkland allowing for some comparative analysis. The urban communities which provide most of the municipality's senior requirements are High River and, to some extent, Okotoks.

7. Municipal District of Bonnyville - North/Rural

The Municipal District of Bonnyville was selected as being representative of a typical rural agricultural community for the farming region of the province located in, and around, the North Saskatchewan River area. It also is representative of the more

established northeastern agricultural zone than the more recently developed northwest zone. The northwest zone is, to some extent, represented by the Town of Peace River which serves the surrounding rural communities. Both zones contain considerable natural resource development other than agriculture. The population of the Municipal District of Bonnyville is about 10,000 persons, which is representative of mid-sized Alberta rural communities. The two most significant service centres located within the Municipal District are the Towns of Bonnyville and Grande Centre.

8. County of Red Deer - Central/Rural

The County of Red Deer's very central location within the province, combined with its typically rural development pattern, makes it an ideal community for representing central/rural Alberta. It has the largest population of all the provincial rural municipalities excepting Strathcona and Parkland, both of which are largely semi-rural and/or urban in nature. Urban communities within the County which service the rural population include the City of Red Deer and the Towns of Penhold, Bowden and Innisfail. Because of its substantial population and proportionately high number of older persons, an adequate sample size could be easily obtained.

9. County of Newell - South/Rural

The County of Newell was selected to represent a typical southern rural community. Of particular relevance in selecting this community was the size of its population which, at 6,000 persons, is sufficiently large to allow for an adequate sample size, yet is still representative of small Alberta rural municipalities. The county is removed from the southern urban and semi-rural communities which have been selected for survey purposes so that a more representative geographic distribution of case study municipalities will be ensured. The Towns of Brooks and Bassano are the two urban communities which provide for the needs of the County's older population.

Subsequent to the selection of the nine case study municipalities utilizing the approach described herein, it was decided, in consultation with the Review Committee, to also administer the survey in the City of Calgary for two reasons. First, the City represents about one third of Alberta's population and, therefore, contains a significant potential market for garden suites. Second, Calgary and Edmonton are suspected of being different from one another with the implication that demand could be different in the two cities. For example, income levels of seniors in Calgary is considerably higher than in Edmonton. The inclusion of Calgary in the sampling process results in the selection of ten representative case study municipalities for study purposes.

Appendix II

Survey Instrument Package

Primary Stakeholder Group

Alberta

MUNICIPAL AFFAIRS

CityCentre, 10155 - 102 Street, Edmonton, Alberta, Canada T5J 4L4

In Replying Please Quote:

January 25, 1991

Dear Sir/Madam:

The Government of Alberta is exploring the appropriateness of a new housing option for older persons called the garden suite. A garden suite is a small, portable, self-contained housing unit placed in a family's yard to accommodate one or more older relatives. To investigate this option, Alberta Municipal Affairs is carrying out a three year pilot project in cooperation with the County of Parkland and the City of Lethbridge. The first phase of this project started in 1989 and involved the construction, placement and occupancy of three garden suite units in the County of Parkland and two in the City of Lethbridge.

The initial experience has been evaluated and the results indicate that garden suites are a good housing option for older persons. Inquiries to Alberta Municipal Affairs also suggest a demand for this option. However, no information is currently available on how large that demand is. Alberta Municipal Affairs has therefore commissioned consultants to estimate the effective demand for garden suites in Alberta. The study involves a survey of prospective occupants and host families to determine the level of interest in the garden suite concept and the consultant has included you in the survey sample. We are requesting you to complete and return the enclosed questionnaire by February 15, 1991. An information package which provides more explanation on the garden suite concept has also been enclosed. Please read this package before completing the questionnaire.

Please be assured that the information you provide will be kept confidential and that your name will not be divulged to any group involved in soliciting.

Thank you in advance for your cooperation. If you have any questions or concerns, please feel free to call the consultant, Linda Taylor, Principal of Applications Management Consulting Ltd. at 425-6741, or my office at 427-8150 in Edmonton.

Yours truly,

Linden Holmen

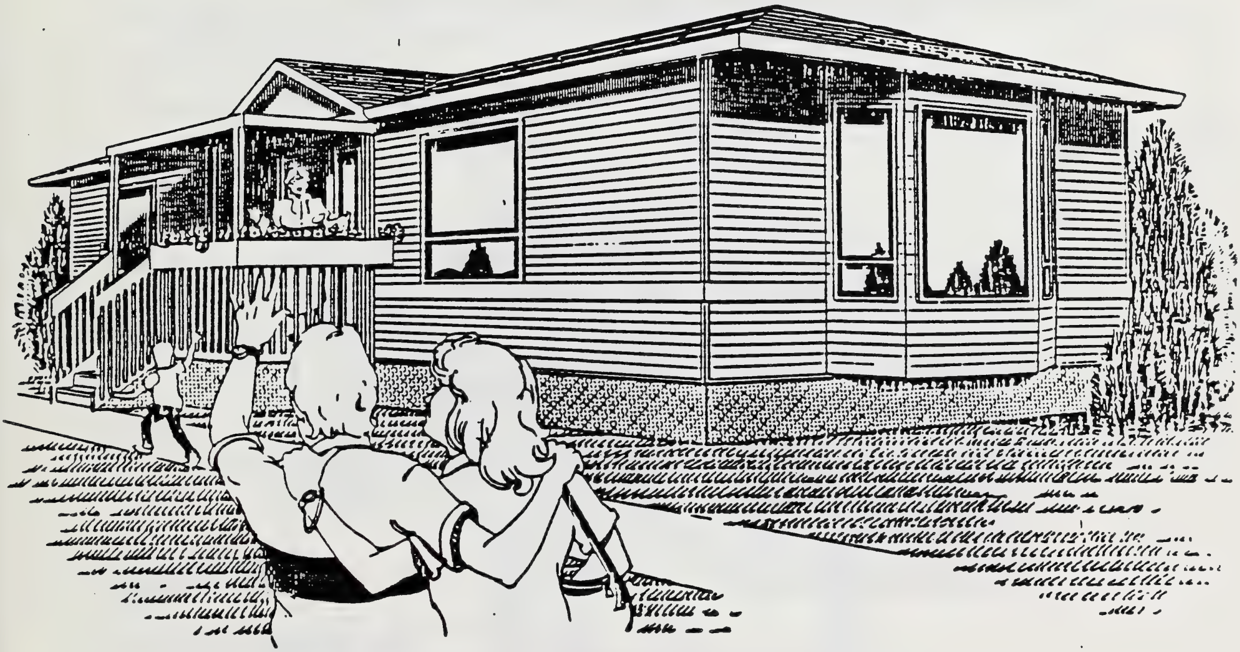
Linden Holmen
Director
Research and Technical Support

LH/cw
Enclosures

GARDEN SUITE CONCEPT INFORMATION PACKAGE

What is a garden suite?

A garden suite is a small, portable, self-contained housing unit for older people that can be placed in the yard of a property with an existing single family home. An illustration of a garden suite is shown below.



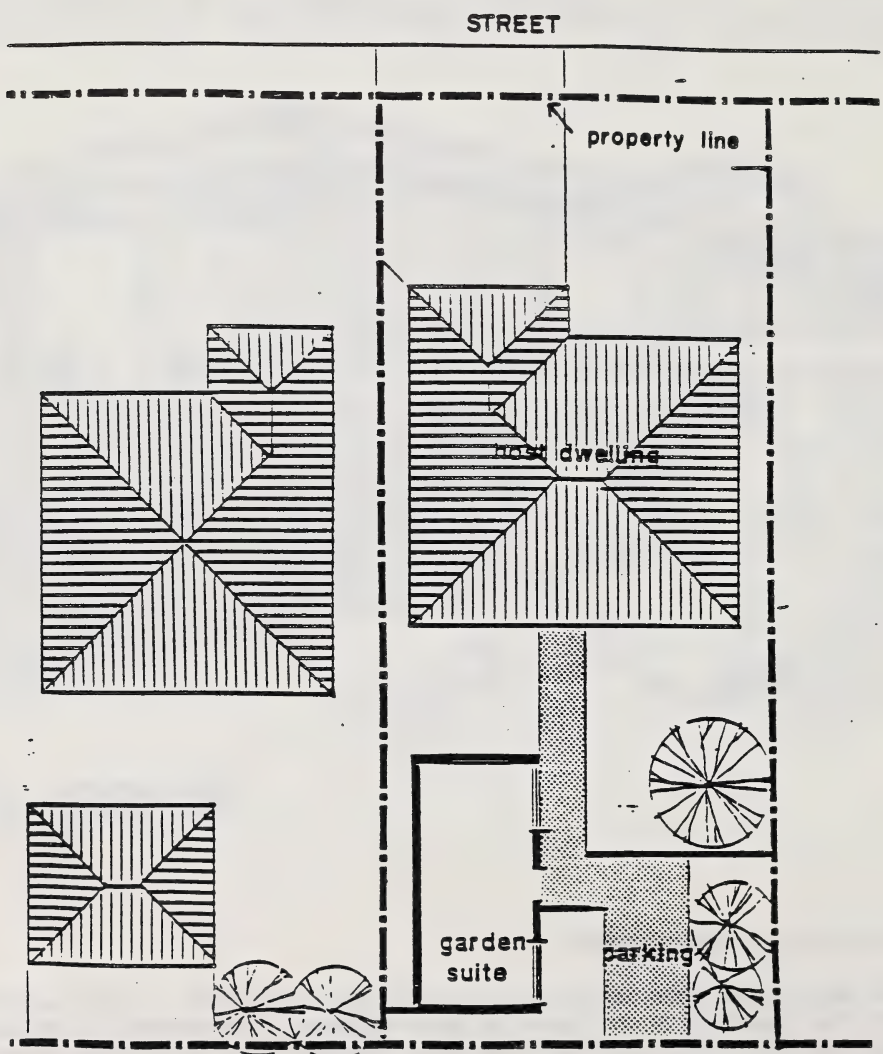
GARDEN SUITE

What is the garden suite concept?

Garden suites allow older members of a family such as parents or grand-parents to live close to the homes of their children or grand-children. The concept allows families to provide a degree of help, care, companionship and security to older family members in a non-institutional family environment. At the same time, both the older person occupying the garden suite unit and the family retain more privacy and independence than if they all shared the same accommodation.

How does the concept work?

The garden suite is owned by a third party who leases it on a monthly basis to the property owner. This arrangement avoids the need for a major capital expenditure by the property owner or garden suite occupant to purchase a unit and facilitates its removal when it is no longer needed by the older person. At commercial rates, the monthly cost to cover unit production, placement and administration could be about $700. The property owner becomes the host family for the garden suite occupant. The host family and garden suite occupant are free to make rental agreements between them if they wish. The garden suite is checked periodically to ensure that it is occupied by the intended occupants and not simply used by host families as rental accommodation for anyone. The drawing below shows how a garden suite may be sited in the yard of a host family.

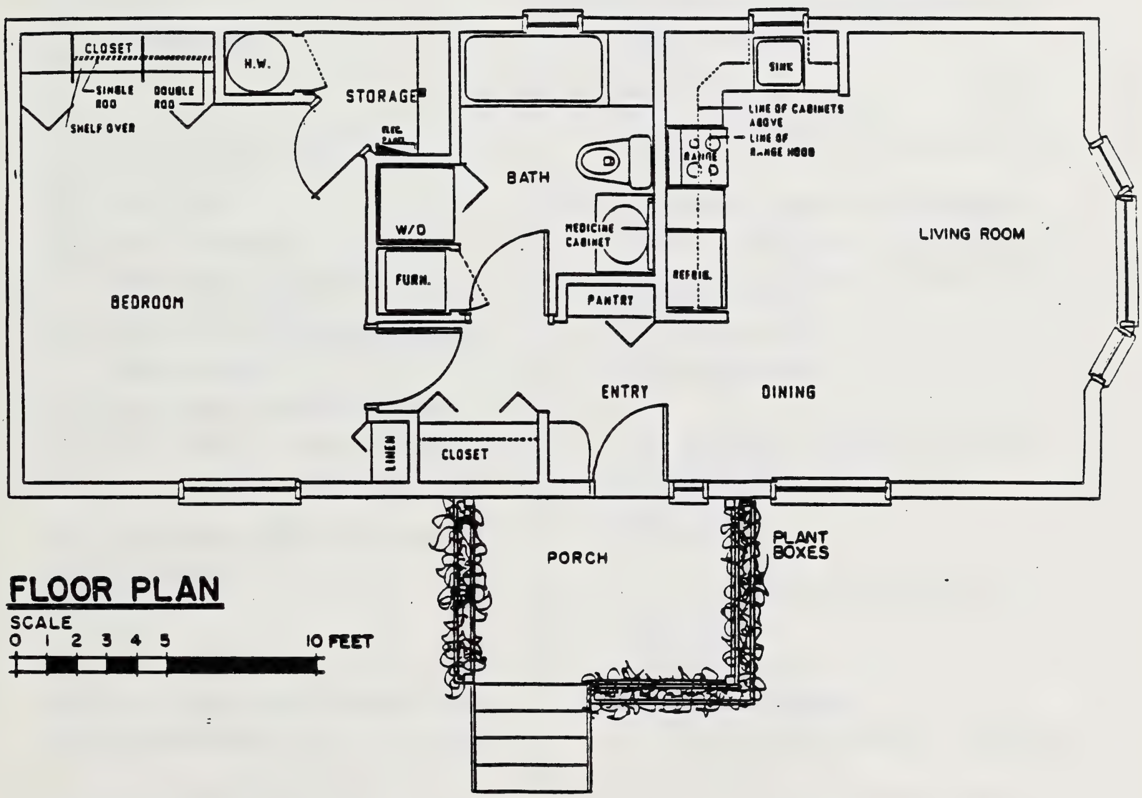


TYPICAL SITE PLAN

What does a garden suite look like inside?

The garden suite is a self-contained one-bedroom unit, approximately 575 square feet in size. It contains a kitchen, dining and living room areas, a bathroom and storage space, and is large enough to accommodate one or two persons.

The floor plan below shows what the garden suites in the pilot project look like. These units were designed to be wheelchair accessible and contain many features that make them more convenient for use by older persons. The exterior of the units have been designed to blend well with normal residential settings.



How do the pilot project participants feel about the garden suite concept?

Shortly after moving into the units, the participants in the Alberta Garden Suite Pilot Project were asked how they felt about the garden suite concept as a living arrangement. In all cases, both the older occupants and the host families reported a significant improvement in their overall quality of life and general satisfaction with the living arrangement.

Seniors Questionnaire

General Information

1. What is your age?________________

2. What is your marital status?
   - ☐ Single
   - ☐ Married
   - ☐ Widowed
   - ☐ Separated
   - ☐ Divorced

3. How would you rate your health?
   - ☐ Good
   - ☐ Satisfactory
   - ☐ Poor

4. What is your present type of accommodation?
   - ☐ Own home
   - ☐ Own apartment
   - ☐ Share home / apartment with family member
   - ☐ Share home / apartment with non-family member
   - ☐ Gov't owned seniors apartment
   - ☐ Other (specify) ________________

5. Are you satisfied with your present accommodation?
   - ☐ Yes
   - ☐ No

6. What is the approximate monthly cost of this accommodation? $____________

7. Is your rent affordable to you?
   - ☐ Yes
   - ☐ No

8. Are you interested in living in a garden suite?
   - ☐ If no, please go to Question #9 (shaded area)
   - ☐ If yes, please go to Question #15 (next page)

Not Interested in Garden Suites

(Please answer Questions #9 through #14).

9. Why are you not interested in a garden suite?
   - ☐ Lack of privacy
   - ☐ Don't have the right relationship with family / friends
   - ☐ Loss of independence
   - ☐ Other (specify) ________________

10. Is there anything that would make you change your mind?
    - ☐ Cost
    - ☐ Health problems
    - ☐ Other (specify)________________

11. If the reason you're not interested is because the rent is too high, what would you be willing to pay per month?
    - ☐ About $225
    - ☐ About $425
    - ☐ About $700

12. Are you currently looking for different living arrangements?
    - ☐ Yes
    - ☐ No

13. If yes, what other options have you considered?
    - ☐ Own home
    - ☐ Own apartment
    - ☐ Share home / apartment with family member
    - ☐ Share home / apartment with non-family member
    - ☐ Gov't owned seniors apartment
    - ☐ Other (specify) ________________

14. What would be the monthly rent of this other option?
    - ☐ About $225
    - ☐ About $425
    - ☐ About $700

Thank you for completing this survey.

Interested in Garden Suites

If you are interested in living in a garden suite, please answer Questions #15 through #26.

15. Why do you want to live in a garden suite?
    - ☐ To be close to family
    - ☐ Concerned about health
    - ☐ Concerned about security
    - ☐ Companionship
    - ☐ Concern over adequate daily care
    - ☐ To provide assistance to the family
    - ☐ Other (specify) ________________

    ____

16. How much would you be willing to pay for a garden suite?
    - ☐ $225
    - ☐ $425
    - ☐ $700

17. On whose property would the garden suite be located?
    - ☐ Son / daughter
    - ☐ Grandson / granddaughter
    - ☐ Niece / nephew
    - ☐ Close friend

18. Does the person(s) identified in Question #17 live in a:
    - ☐ City / town / village
    - ☐ Farm
    - ☐ Country residential lot (acreage)

19. Do you feel your host family would want a garden suite in their yard?
    - ☐ Yes
    - ☐ No

20. If yes, why do you feel they would want a garden suite in their yard?
    - ☐ Peace of mind
    - ☐ Help with household and family matters
    - ☐ Companionship
    - ☐ Other (specify) ________________

    ____

21. Is there another family you could approach to accommodate your garden suite? If yes, who?
    - ☐ Son / daughter
    - ☐ Grandson / granddaughter
    - ☐ Niece / nephew
    - ☐ Close friend

22. On what type of property does the individual(s) identified in Question #21 live?
    - ☐ City / town / village
    - ☐ Farm
    - ☐ Country residential (acreage)

23. Are you currently looking for living arrangements different from your present situation?
    - ☐ Yes
    - ☐ No

24. If yes, what other options have you considered?
    - ☐ Own home
    - ☐ Own apartment
    - ☐ Share home / apartment with family member
    - ☐ Share home / apartment with non-family member
    - ☐ Gov't owned seniors apartment
    - ☐ Other (specify) ________________

25. What would be the approximate monthly rent of this other option?
    - ☐ About $225
    - ☐ About $425
    - ☐ About $700

26. What would be most important to you in choosing a type of accommodation? (Please rank from 1-6)
    - ☐ Cost (rent level)
    - ☐ Proximity to relatives / friends
    - ☐ Privacy
    - ☐ Independence
    - ☐ Security
    - ☐ Other (specify) ________________

Thank you for completing this survey.

Garden Suite Host Family Information

If you have indicated an interest in a garden suite, we would appreciate receiving the name of the family (ies) that you feel would be interested in having you live in a garden suite in their backyard. The purpose of this information is to send a survey to this family to get their impressions of the concept.

Again, thank you for completing this survey.

Name: ______________________________

Address: ______________________________

____

____

Telephone Number: ______________________________

Relationship to you: ______________________________

Host Family Questionnaire

General Information

1. What is your age?______

2. Number of persons in household?______

3. Relationship to senior as prospective garden suite occupant?
   - ☐ Son / daughter
   - ☐ Grandson / granddaughter
   - ☐ Niece / nephew
   - ☐ Close friend

4. Type of property?
   - ☐ City / town / village
   - ☐ Farm
   - ☐ Country residential (acreage)

5. Do you own your own home?
   - ☐ Yes
   - ☐ No

6. Is your lot large enough to accommodate a garden suite?
   - ☐ Yes
   - ☐ No

7. Are you interested in having a garden suite in your backyard for this or some other senior?
   - ☐ Yes (please go on to Question #8)
   - ☐ No (please go to Question #9 - shaded area)

8. If some other senior is identified in Question #7, what is the relationship?
   - ☐ Son / daughter
   - ☐ Grandson / granddaughter
   - ☐ Niece / nephew
   - ☐ Close friend

If you answered yes to Question #7 or answered Question #8, please proceed to Question #11 (next page).

Not Interested in Garden Suites

9. Why are you not interested in the garden suite concept?
   - ☐ Lack of privacy
   - ☐ Don't have the right relationship with senior
   - ☐ Rent too high
   - ☐ Reduced yard space
   - ☐ Neighbors reaction
   - ☐ Other (specify) ______________

10. Is there anything that would make you change your mind?
    - ☐ Reduced independence of senior (eg. health problems)
    - ☐ Increased need to help your family (eg. looking after your children)
    - ☐ Other (specify) ______________

Thank you for completing this survey.

Interested in Garden Suites

If you are interested in having a garden suite, please answer Questions #11 through #17.

11. Why are you interested in the garden suite alternative?
    - ☐ To have senior nearby
    - ☐ Concerned about senior's health
    - ☐ Concerned about senior's security
    - ☐ Social contact
    - ☐ Concerned about adequacy of senior's daily care
    - ☐ To provide assistance to you and your family
    - ☐ Other (specify) ______________________

12. What do you feel would be a <u>fair</u> monthly rental rate for the garden suites?
    - ☐ About $700
    - ☐ About $425
    - ☐ About $225

13. What misgivings do you have about the garden suites, if any (check all appropriate categories)?
    - ☐ Lack of privacy
    - ☐ Too many demands by senior
    - ☐ Neighbors response
    - ☐ Reduced yard space
    - ☐ Other (specify)______________________

14. Do you expect to provide financial support to the senior? If yes, approximately how much per month? $__________

15. In your opinion, how long do you feel the senior can maintain his/her current living arrangement, before an alternative must be found?
    - ☐ Less than 1 year
    - ☐ 1 year - 3 years
    - ☐ 3 years - 5 years
    - ☐ More than 5 years

16. What other housing options, if any, have you considered for the senior?
    - ☐ Own home
    - ☐ Own apartment
    - ☐ Share home / apartment with family member
    - ☐ Share home / apartment with non-family member
    - ☐ Gov't owned seniors apartment
    - ☐ Other (specify)______________________

17. What would be your reaction if a neighbor put a garden suite in their yard?
    - ☐ Positive
    - ☐ Negative
    - ☐ Indifferent

    Why?______________________

Thank you for taking the time to complete this survey.

Garden Suite Senior Information

If you have indicated an interest in a garden suite, we would appreciate receiving the name of the senior(s) that you feel would be interested in living in a garden suite in your backyard. The purpose of this information is to send a survey to this senior to get their impressions of the concept.

Again, thank you for completing this survey.

Name: ______________________________

Address: ______________________________

____

____

Telephone Number: ______________________________

Relationship to you: ______________________________

Appendix III

Seniors' and Related Organizations

SENIOR ORGANIZATIONS

City of Edmonton

Ms. Sonja Barton
Administrative Assistant
Calder Seniors Drop-in Society
12963 - 120 Street
Edmonton, Alberta
T5E 5N8
451-1925

Ms. Lenore Hartstok
Program Coordinator
Central Lions Drop-in Centre
11113 - 113 Street
Edmonton, Alberta
T5G 2V1
428-5265

Mrs. Ann Campbell
President
Highlands Seniors Assoc
#316 6209 - 118 Avenue
Edmonton, Alberta
T5W 5A6
474-6387

Ms. Phyllis Lassey
Chairperson
Northgate Lions Senior Citizens
7524 - 139 Avenue
Edmonton, Alberta
T5C 3H7
428-5195

Ms. Dawning Boston
Director
Senior Citizens Opportunity Neighbourhood Association (S.C.O.N.A)
10440 - 84 Avenue
Edmonton, Alberta
T6E 2H2
433-5377

Mr. Ian Chessor
President
South East Edmonton Seniors
9350 - 82 Street
Edmonton, Alberta
T6C 2X8
468-1985

Mr. Jeff Allen
Director
Strathcona Place Society:
10831 - University Avenue
Edmonton, Alberta
T6E 4R1
433-5807

Veronica Davidovich
Director
West Edmonton Seniors
11353 Jasper Avenue
Edmonton, Alberta
T5K-0L9
488-8583

Ms. Hazel Christensen
Housing Coordinator
Society for the Retired and Semi-Retired
15 Sir Winston Churchill Square
Edmonton, Alberta
T5J-2E5
423-5510

Ms. Rosalie Gelderman
c/o Operation Friendship
McCauley Community League
9526-106 Avenue
Edmonton, Alberta
T5H-0N2
429-2626

City of Calgary

Fran Schweitz
Bowmont Senior Citizens' Club
6422 35 Avenue NW
Calgary Alberta
T3B-1S6
286-4488

Hilda Townsend
Program Coordinator
Bow Cliff Seniors
608 Poplar Road SW
Calgary, Alberta
T3C-2Z7
246-0390

Senior Citizens Accomodation Registry - Kerby Centre
11337 Avenue SW
Calgary, Alberta
T2P-1B2
265-0661

City of Lethbridge

Ms. Jacquie Hunt
Home Care Coordinator
Home Care Operations
801 - 1st Avenue South
Lethbridge, Alberta
T1J 4L5
327-3827

Mr. Dennis Dray
Director
Lethbridge Senior Centre
500 - 11th Street South
Lethbridge, Alberta
T1J 4G7
320-2222

Ms. Shirley Saillian
Coordinator
Nord Bridge Senior Citizens Assoc
207 - 13th Street North
Lethbridge, Alberta
T1H 2R6
329-8823

Mr. Tony Kovac
Manager
Lethbridge Legion Branch #4
Senior Citizens Housing Society
#100 918-16 Street South
Lethbridge, Alberta
T1J-3B9

Town of Hanna

Ms. Muriel Dyck
Home Care Coordinator
Big Country Health Unit
P.O. Box 279
Hanna, Alberta
T0J 1P0
854-3325

Mr. Russel Mayberry
Secretary
Hanna Pioneer Association
Box 327
Hanna, Alberta
T0J 1P0
854-4316

Mr. Jim Holman
Manager
Hanna Housing Authority
P.O. Box 1239
Hanna, Alberta
T0J 1P0
854-3936

Town Of Peace River

Ms. Lois Stranahan
Resource Information Person
Peace River Drop-In Centre
11418-101 Street
Peace River, Alberta
T8S-1M2
624-3122

County of Newell

Mrs. Leona Ferguson
Area Manager
Southeastern Health Unit
P.O. Box 894
Brooks, Alberta
T0J 0J0
362-7766

Mr. Bud Sagstuen
President
Pioneer Damsitters Senior Drop-In Centre
Box 268
Bassano, Alberta
T0J-0B0
641-3604

Ms. Laroyce Swanson
President
Prairie Pioneer Hall
#507 2 Street W
Brooks, Alberta
T0J-0J0
362-3555

County of Red Deer

Ms. Sandy McGrath
Director - Home Care
Red Deer Regional Health Unit
2845 Bremner Avenue
Red Deer, Alberta
T4R 1S2
341-2100

Ms. Joy Hoerle
Director
Golden Circle Senior Centre:
4620 - 47th Avenue
Red Deer, Alberta
T4N 3P5
343-6074

Ms. Beulah Schott
President
Bowden Friendship Club
P.O. Box 381
Bowden, Alberta
T0M 0K0
224-2114

Ms. Debbie Bailey
Manager
Bowden Lions Housing Project
P.O. Box 73
Bowden, Alberta
T0M 0K0
224-2183

Ms. Betty Gledhill
President
Innisfail Drop-in Centre
P.O. Box 332
Innisfail, Alberta
T0M 1A0
227-4441

County of Parkland

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President
Senior Citizens Society-Stony Plain
P. O. Box 699
Stony Plain, Alberta
T0E 2G0
963-4707

Judy Tait
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Stony Plain/Lac Ste. Anne Health Unit
P.O. Box 210
Stony Plain, Alberta
T0E 2G0
963-3366

Mr. Alex Barnes
President
Spruce Grove Golden Age Club
32 Miller Avenue
Spruce Grove, Alberta
962-5020

County of Foothills

Ms. Janet Melbourne
Assistant Director of Home Programs
Foothills Health Unit
P.O. Box 1390
High River, Alberta
T0L 1B0
652-3200

Mrs. Bessie Leslie
President
High River Friendship Group
Box 1941
High River, Alberta
T0L 1B0
652-4149

Mrs. Erma Brown
Secretary/Treasurer
Griffiths Memorial Centre
Box 213
Black Diamond, Alberta
T0L-0H0
933-4075

County of Bonnyville

Mr. J. P. Compeau
President
Bonnyville Seniors Drop-in Centre
4813 - 47 Avenue
Bonnyville, Alberta
T9N 1M4
826-3619

Ms. Donna Weinberger
Manager
Bonnyville District Foundation
4712-47 Avenue
Bonnyville, Alberta
T9N 2E7
826-2186

Mr. Peter Burn
President
Grande Centre Senior Citizens Club
General Delivery
Grande Centre, Alberta
T0A 1T0
594-5666

Appendix IV

Demand Issue Paper
and
Related Mail-Out List

(Planning and Subdivision Approving Authorities)

Issue 5: Demand For Garden Suites

The preliminary assessment of the Alberta Garden Suite Pilot Project concluded that a demand exists for garden suites in Alberta. However, a more precise estimate of demand is required in order to gauge market potential and spur private initiative and public sector support. To that end, Alberta Municipal Affairs has commissioned a study to estimate effective demand for garden suites in Alberta. The study approach involves the surveying of two groups: primary stakeholders, that is potential occupants and host families; and secondary stakeholders, a group which includes regional planning commissions, municipal subdivision approving authorities and appropriate seniors' organizations. This latter group is being surveyed by requesting a response to this issue paper in order to get a better feel for demand at the municipal level based upon local knowledge. Such knowledge is considered to be a major asset not only in gauging local demand for garden suites, but also in determining why such demand may or may not exist. Examples of indicators of local demand for garden suite units include:

- enquiries received as to the feasibility of placing a second unit on a property;
- applications for development permits which require an Alberta Planning Board exemption to place a second unit;
- public input dealing with garden suites, seniors' housing or other related issues obtained during preparation of regional plans, general municipal plans, land use by-laws or any other type of statutory or community plan; and,
- calls of interest or information requests directly related to the garden suite concept and/or the pilot project.

In gauging local demand, it is important to stress that interest does not translate directly into demand. For example, the number of applicants that withdrew from the pilot project upon further consideration suggests that the attitudes of some individuals toward the concept may change once its implications are fully understood. The surprisingly few number of initial garden suite applicants in both the pilot project municipalities is further testimony that actual demand may fall short of expressions of fairly high interest such as those identified by a 1987 Gallup survey based upon the National Garden Suite Demonstration Project. Regardless, interest is an important indicator of demand and does provide a measure which can be used in concert with other more objective measures. In estimating local demand, certain variable factors should be considered, including:

- urban versus rural demand levels;
- size of community;
- size of senior population;
- local development patterns and lot sizes;
- availability of seniors' accommodation;
- cultural variations and values; and,
- public acceptance.

These factors, among others, will be considered in concert with the results of the primary stakeholder group survey in estimating effective demand for garden suites.

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Mr. R. H. Botham
Director
Battle River Regional Planning Commission
5014 - 48 Avenue
Wetaskiwin, Alberta
T9A 0M9

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Calgary, Alberta
T2G 4X1

Mr. Ron Mattiussi
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Edmonton Metropolitan Regional Planning Commission
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T0H 0E0

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Lethbridge, Alberta
T1J 0P4

Mr. F. Wesseling
Director
Palliser Regional Planning Commission
Drawer 1900
Hanna, Alberta
T0J 1P0

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Red Deer, Alberta
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9804 - 100 Avenue
Grande Prairie, Alberta
T8V 0T8

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Medicine Hat, Alberta
T1A 0L1

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City Manager
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Planning and Development Administrator
City of Grande Prairie
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Grande Prairie, Alberta
T8V 2P5

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City of Red Deer
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Red Deer, Alberta
T4N 3T4

Mr. John Cosgrove
Manager
City of Spruce Grove
410 King Street
Spruce Grove, Alberta
T7X 2Z1

Mr. John VanDoesburg
Manager
City of Wetaskiwin
Box 6266
Wetaskiwin, Alberta
T9A 2E9

Appendix V

Survey Letter Instrument
for
Seniors' and Related Organizations

December 21, 1990

Dear

Re: Demand Study - Alberta Garden Suite Pilot Project

As you may recall, you were recently asked to assist in a study commissioned by Alberta Municipal Affairs to estimate the effective demand for garden suites in Alberta by helping to identify a sample of seniors who could be surveyed about their interest in garden suites. Your assistance was greatly appreciated. You also may recall that the survey was only a part of the consultants' efforts to estimate demand for garden suites. Information and opinions from seniors' organizations and housing agencies such as yours is also valuable input for estimating effective demand. Your comments on a number of demand related questions are therefore being requested. An information package outlining the garden suite concept has been enclosed for your reference.

1. Do you feel there is a demand for garden suites in your area?

2. Do you feel that this demand, if any, is minimal or fairly extensive?

3. Do you feel the current housing options in your community adequately meet the needs of the older population?

4. If garden suites were made available as another seniors' housing option, do you feel it would compete with, or complement, existing options?

5. Do you feel the garden suite option would be accepted by the community?

6. What problems, if any, related to community acceptance do you foresee?

7. What sort of family or other relationship between the occupant and host family do you think is desirable in order for the garden suite living arrangement to work well?

8. What do you feel is an appropriate minimum age for occupants?

The consultants responsible for carrying out this part of the study are Applications Management Consulting Ltd. and a member of that firm will be contacting you by telephone within the next two weeks to discuss your thoughts on these and any other related questions you may wish to discuss. If you have any concerns or questions, please feel free to call me or Olga Lovatt at 425-6741 in Edmonton.

Yours truly,

Linda Taylor

Linda Taylor
Principal

LH/cw

Appendix VI

Detailed Senior Survey Questionnaire Results

SENIOR Q

Frequency breakdown of LOCATION

Location	Community	Region	Count	%
Edm/Cal	U	C/S	134	50.8
Ardmore	R	N	1	0.379
Bassano	R	S	2	0.758
Black Diamond	SR	S	4	1.52
Blairmore	R	S	1	0.379
Bonnyville	R	N	23	8.71
Brooks	R	S	10	3.79
Clive	R	C	1	0.379
Claresholm	R	S	1	0.379
Consort	R	S	5	1.89
Drayton Valley	R	C	1	0.379
Dixonville	R	N	1	0.379
Empress	R	S	3	1.14
Fort Kent	R	N	2	0.758
Grand Centre	R	N	3	1.14
Hanna	U	S	11	4.17
High River	SR	S	16	6.06
Innisfail	R	C	4	1.52
Lethbridge	U	S	5	1.89
Lousana	R	C	1	0.379
Okotoks	SR	S	2	0.758
Phoenix	n/a	n/a	1	0.379
Peace River	U	N	18	6.82
Red Deer	R	C	1	0.379
Sangudo	SR	C	1	0.379
Spruce Grove	SR	C	4	1.52
Stony Plain	SR	C	3	1.14
Three Hills	R	S	1	0.379
Tilley	R	S	1	0.379
Turner Valley	SR	S	2	0.758
Wabamun	SR	C	1	0.379
			264	

Columns are levels of Interest
Rows are levels of Type of Community

	No	Yes	Total
Rural	53	9	62
Semi-rural	25	8	33
Urban	134	34	168
n/a	1	0	1
Total	213	51	264

Columns are levels of Interest
Rows are levels of Region

	No	Yes	Total
Edm/Cal	107	27	134
Central	15	2	17
North	37	11	48
South	53	11	64
n/a	1	0	1
Total	213	51	264

2

Columns are levels of — Interest
Rows are levels of — What is your marital status?

	No	Yes	Total
Divorced	13	1	14
Married	101	22	123
Separated	3	0	3
Single	10	4	14
Widowed	80	23	103
n/a	6	1	7
total	213	51	264

3

Columns are levels of — Interest
Rows are levels of — How would you rate your health?

	No	Yes	Total
Good	114	25	139
Poor	9	2	11
Satisfactory	86	22	108
n/a	4	2	6
total	213	51	264

4

Columns are levels of — Interest
Rows are levels of — What is your present type of accomodation?

	No	Yes	Total
Own home	118	31	149
Own apt.	24	5	29
Share w/ family	8	2	10
Share w/ nonfamily	3	0	3
Gov't owned seniors apt.	35	6	41
rent	10	3	13
other	11	2	13
n/a	4	2	6
total	213	51	264

5

Columns are levels of — Interest
Rows are levels of — Are you satisfied with your present accomodation?

	No	Yes	Total
No	10	12	22
Yes	194	36	230
n/a	9	3	12
total	213	51	264

#6 Columns are levels of Interest
Rows are levels of What is the approximate monthly cost of this accomodation?

	No	Yes	Total
<225	42	9	51
225-424	59	15	74
425-699	40	12	52
700+	9	2	11
n/a	63	13	76
total	213	51	264

#7 Columns are levels of Interest
Rows are levels of Is your rent affordable to you?

	No	Yes	Total
No	4	5	9
Yes	115	25	140
n/a	94	21	115
total	213	51	264

#8 Frequency breakdown of Are you interested in living in a garden suite?

	Frequency	%
No	213	81
Yes	51	19
total	264	100

#9 Frequency breakdown of Why are you not interested in a garden suite? *

#who answered	201
#who did not	12
Total	213

	Frequency	%
Lack of privacy	19	8
Wrong relationship	39	17
Loss of independence	41	18
Satisfied now	36	16
Prefer other housing opt.	8	3
Own home	12	5
Not required	18	8
Cost	10	4
Unsuitable location	24	10
Other	23	10
Total	230	100

* This question includes multiple responses by respondents.

#10 Frequency breakdown of Is there anything that would make you change your mind? *

#who answered	161
#who did not	52
Total	213

	Frequency	%
Cost	23	14
Health problems	65	40
No	49	30
Change in marital status	4	2
Suitable location	3	2
Older age	3	2
Other	17	10
Total	164	100

#11 Frequency breakdown of If the reason you're not interested is because the rent is too high, what would you be willing to pay per month?

	Frequency	%
225	30	14
425	47	22
700	3	1
n/a	133	62
total	213	100

#12 Frequency breakdown of Are you currently looking for different living arrangements?

	Frequency	%
No	189	89
Yes	15	7
n/a	9	4
total	213	100

#13 Frequency breakdown of If yes, what other options have you considered? *

#who answered	34
#who did not	179
Total	213

	Frequency	%
Own home	9	25
Own apt.	6	17
Share w/ family	2	6
Share w/ nonfamily	1	3
Gov't owned seniors apt.	14	39
Other	4	11
Total	36	100

* These questions include multiple responses by respondents.

#14 Frequency breakdown of What would be the monthly rent of this other option?

	Frequency	%
225	9	4
425	22	10
700	5	2
n/a	177	83
Total	213	100

#15 Frequency breakdown of Why do you want to live in a garden suite? *

#who answered	49
#who did not	2
Total	51

	Frequency	%
To be close to family	41	35
Concern with health	14	12
Concern with security	15	13
Companionship	20	17
Concern over daily care	12	10
Provide help to family	14	12
other	1	1
Total	117	100

#16 Frequency breakdown of How much would you be willing to pay for a garden suite?

	Frequency	%
225	19	37
425	28	55
700	2	4
n/a	2	4
total	51	100

#17 Frequency breakdown of On whose property would the garden suite be located?

	Frequency	%
Son/daughter	45	88
Grandson/granddaughter	0	0
Niece/nephew	3	6
Close friend	1	2
Own property	2	4
Total	51	100

* This question includes multiple responses by respondents.

#18 Frequency breakdown of Does the person(s) identified in Question #17 live in a:

	Frequency	%
City/town/village	31	61
Farm	10	20
Country residential lot	9	18
n/a	1	2
Total	51	100

#19 Frequency breakdown of Do you feel your host family would want a garden suite in their yard?

	Frequency	%
Yes	45	88
n/a	6	12
Total	51	100

#20 Frequency breakdown of If yes, why to you feel they would want a garden suite in their yard? *

#who answered	48
#who did not	3
Total	51

	Frequency	%
Peace of mind	32	45
Help w/ house and family	16	23
Companionship	19	27
Other	4	6
total	71	100

#21 Frequency breakdown of Is there another family you could approach to accomodate your garden suite? If yes, who?

	Frequency	%
Son/daughter	17	33
Grandson/granddaughter	1	2
Niece/nephew	1	2
Close friend	4	8
n/a	28	55
Total	51	100

#22 Frequency breakdown of On what type of property does the individual(s) identified in Question #21 live?

	Frequency	%
City/town/village	14	27
Farm	9	18
Country residential lot	4	8
n/a	24	47
Total	51	100

* This question includes multiple responses by respondents.

#23 Frequency breakdown of Are you currently looking for living arrangements different from your present situation?

	Frequency	%
No	30	59
Yes	19	37
n/a	2	4
Total	51	100

#24 Frequency breakdown of If yes, what other options have you considered? *

#who answered	24
#who did not	27
Total	51

	Frequency	%
Own home	3	10
Own apt.	6	21
Share w/ family	1	3
Share w/ nonfamily	0	0
Gov't owned seniors apt.	15	52
Other	4	14
Total	29	100

#25 Frequency breakdown of What would be the approximately monthly rent of this other option?

	Frequency	%
225	10	20
425	12	24
700	3	6
n/a	26	51
total	51	100

#26 Frequency breakdown of What would be most important to you in choosing a type of accomodation? *

#who answered	49
#who did not	2
Total	51

	Frequency	%
Cost	34	18
Proximity	40	22
Privacy	35	19
Independence	39	21
Security	36	20
Total	184	100

* These questions include multiple responses by respondents.

CORRELATION TABLES

Columns are levels of Q#5
Rows are levels of Q#4
Cases selected according to Interest-Yes (Q#8)

	No	Yes	n/a	Total
Own home	3	26	2	31
Own apt.	3	2	0	5
Share w/ family member	0	2	0	2
Gov't owned seniors apt.	3	3	0	6
				0
rent	1	2	0	3
other	2	0	0	2
n/a	0	1	1	2
	12	36	3	51

Columns are levels of Q#7
Rows are levels of Q#6
Cases selected according to Interest-Yes (Q#8)

	No	Yes	n/a	Total
<$225	0	3	6	9
$225-$424	0	11	4	15
$425-$699	4	7	1	12
$700 +	1	1	0	2
n/a	0	3	10	13
	5	25	21	51

Columns are levels of Q#7
Rows are levels of Q#6
Cases selected according to Interest-No (Q#8)

	No	Yes	n/a	Total
<$225	0	22	20	42
$225-$424	1	46	12	59
$425-$699	2	33	5	40
$700 +	0	6	3	9
n/a	1	8	54	63
	4	115	94	213

Columns are levels of Q#25
Rows are levels of Q#24
Cases selected according to Looking-Yes (Q#23)

	225	425	700	n/a	Total
Own home	0	0	0	1	1
Own apt.	0	3	1	0	4
Gov't owned seniors apt.	4	6	0	2	12
other	3	0	0	0	3
n/a	0	0	0	1	1
total	7	9	1	4	21

Appendix VII

Detailed Host Family Survey Questionnaire Results

HOST Q

Frequency breakdown of LOCATION

Location	Community	Region	Count	%
Edm/Cal	U	C/S	25	46
Bassano	R	S	1	2
Bonnyville	R	N	4	7
Brooks	R	S	2	4
Carvel	SR	C	1	2
Grimshaw	R	N	1	2
Hanna	U	S	4	7
High River	SR	S	1	2
Innisfail	R	C	3	6
Kamloops	n/a	n/a	1	2
Lethbridge	U	S	1	2
Mallaig	R	N	1	2
Onoway	SR	C	1	2
Peace River	U	N	4	7
Stony Plain	SR	C	3	6
St. Vincent	R	N	1	2
			54	100

Columns are levels of Interest
Rows are levels of Type of Community

	No	Yes	Total
Rural	9	4	13
Semi-rural	4	2	6
Urban	24	10	34
n/a	1	0	1
Total	38	16	54

Columns are levels of Interest
Rows are levels of Region

	No	Yes	Total
Edm/Cal	17	8	25
Central	5	3	8
North	9	2	11
South	6	3	9
n/a	1	0	1
Total	38	16	54

HOST Q

\# 1 Columns are levels of Interest
Rows are levels of What is your age?

	No	Yes	Total
25-29	7	3	10
30-34	2	5	7
35-39	6	4	10
40-44	4	0	4
45-49	5	3	8
50-54	2	1	3
55-59	3	0	3
60-64	3	0	3
65-69	1	0	1
70-74	0	0	0
75-79	1	0	1
80-84	1	0	1
85-89	1	0	1
90+	0	0	0
n/a	2	0	2
	38	16	54

\# 2 Columns are levels of Interest
Rows are levels of Number of persons in households?

	No	Yes	Total
1	4	1	5
2	12	4	16
3	6	3	9
4	11	5	16
5	0	2	2
6	0	1	1
7	1	0	1
n/a	4	0	4
Total	38	16	54

\# 3 Columns are levels of Interest
Rows are levels of Relationship to senior as prospective garden suite occupant?

	No	Yes	Total
Son/daughter	18	9	27
Grandson/granddaughter	1	3	4
Niece/nephew	0	1	1
Close friend	1	0	1
n/a	18	3	21
total	38	16	54

\# 4 Columns are levels of Interest
Rows are levels of Type of property?

	No	Yes	Total
City/town/village	25	12	37
Farm	5	1	6
Country residential	5	3	8
n/a	3	0	3
total	38	16	54

\# 5 Columns are levels of Interest
Rows are levels of Do you own your own home?

	No	Yes	Total
No	1	0	1
Yes	35	16	51
n/a	2	0	2
total	38	16	54

\# 6 Columns are levels of Interest
Rows are levels of Is your lot large enough to accommodate a garden suite?

	No	Yes	Total
No	14	5	19
Yes	20	11	31
n/a	4	0	4
total	38	16	54

\# 7 Frequency breakdown of Are you interested in having a garden suite in your backyard for this or some other senior?

	Frequency	%
No	38	70
Yes	16	30
total	54	100

\# 8 Frequency breakdown of If some other senior is identified in Question #7, what is the relationship?

	Frequency	%
Son/daughter	1	6
Grandson/granddaughter	1	6
Niece/nephew	0	0
Close friend	1	6
n/a	13	81
total	16	100

#9 Frequency breakdown of Why are you not interested in the garden suite concept? *

#who answered	38
#who did not	0
Total	38

	Frequency	%
Lack of privacy	4	7
Wrong relationship	10	18
Rent too high	9	16
Reduced yard space	13	23
Neighbors' reaction	3	5
Other	18	32
total	57	100

#10 Frequency breakdown of Is there anything that would make you change your mind? *

#who answered	23
#who did not	15
Total	38

	Frequency	%
Reduced independence	10	37
Need to help family	8	30
No	1	4
Other	8	30
total	27	100

#11 Frequency breakdown of Why are you interested in the garden suite alternative? *

#who answered	15
#who did not	1
Total	16

	Frequency	%
To have senior nearby	7	16
Concern about health	9	20
Concern about security	6	14
Social contact	9	20
Concern about daily care	7	16
To provide assistance	6	14
total	44	100

* These questions include multiple responses by respondents.

HOST Q

#12 Frequency breakdown of What do you feel would be a fair monthly rental rate for the garden suites?

	Frequency	%
225	3	19
425	9	56
n/a	4	25
total	16	100

#13 Frequency breakdown of What misgivings do you have about the garden suites, if any (check all appropriate categories)? *

#who answered	12
#who did not	4
Total	16

	Frequency	%
Lack of privacy	2	14
Too many demands	2	14
Neighbors' response	0	0
Reduced yard space	7	50
Other	3	21
total	14	100

#14 Frequency breakdown of Do you expect to provide financial support to the senior? If yes, approximately how much per month?

	Frequency	%
0	1	6
200	2	13
n/a	13	81
total	16	100

#15 Frequency breakdown of In your opinion, how long do you feel the senior can maintain his/her current living arrangement, before an alternative can be found?

	Frequency	%
Less than 1 year	1	6
1 year - 3 years	4	25
3 years - 5 years	2	13
More than 5 years	4	25
n/a	5	31
total	16	100

* This question includes multiple responses by respondents.

\# 16 Frequency breakdown of What other housing options, if any, have you considered for the senior? *

#who answered	12
#who did not	4
Total	16

	Frequency	%
Own home	1	6
Own apt.	2	13
Share w/ family	2	13
Share w/ nonfamily	0	0
Gov't owned seniors apt.	8	50
Other	3	19
total	16	100

\# 17 Frequency breakdown of What would be your reaction if a neigbor put a garden suite in his/her yard?

	Frequency	%
Positive	10	63
Negative	0	0
Indifferent	4	25
n/a	2	13
total	16	100

Comments: >None of my concern (2)
>Good concept - maintains family unit (7)

* This question includes multiple responses by respondents.